PANEL PACKET
January 2018

STATE OF CALIFORNIA

ETP

EMPLOYMENT TRAINING PANEL

STATE OF CALIFORNIA

ETP

EMPLOYMENT TRAINING PANEL

NOTICE / AGENDA

MEETING TIME/PLACE

Wednesday, January 24, 2018 at 9:30 a.m.
New City Hall, 915 I Street
Council Chambers, Room 1103
Sacramento, CA 95814
Phone: (916) 327-5640

AGENDA

9:30 a.m.	Call to Order by Chair	Barry Broad
	• Roll Call	
	• Agenda	
	• Minutes	
9:45 a.m.	Report of the Executive Director	Stewart Knox
	• Legislative/Budget/Other	
	• Request Motion to Delegate in Event of Loss of Quorum/Action	
	• Request Motion to Adopt Consent Calendar Projects/Action	
10:00 a.m.	Review and Action on Proposals	Gregg Griffin
		Diana Torres
		Anna Nastari
		Mark Mazzone

Public Comments

Public Meeting Adjourns

Break

Subcommittee Meeting on Substantial Contribution to Follow

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 Other changes may also occur (e.g. withdrawn).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 Thursday, January 18, 2018 although the Panel may still change the order at the meeting.

North Hollywood Regional Office

Advanced Bionics, LLC --- $242,000
Giroux Glass, Inc. --$73,920
Pyramid San Gabriel Management L.P. dba
   Sheraton San Gabriel -- $200,400
RDC-S111, Inc. --- $117,432
Santa Clarita Community College District -------------------------------------- $647,584
ServiceTitan, Inc. --- $209,790
Southern California Permanente Medical Group –-WITHDRAWN------- $749,520
Studio Arts, Ltd. -- $600,600
Trench Plate Rental Co. --- $193,572
WorldWind Services, LLC --$65,000

San Diego Regional Office

Aemerge RedPak Services of Southern California, LLC -------------------$68,250
Automobile Club of Southern California ------------------------------------- $507,200
Correctional Medical Group Companies, Inc. -------------------------------- $407,520
Murrieta Chamber of Commerce (Amendment) --------------------------- $238,650
QPE Technical Institute, Inc. --- $269,858
Santa Ana Chamber of Commerce -- $949,351

San Francisco Bay Area Regional Office

BPM LLP -- $306,000
International Business Machines Corporation ------------------------------- $734,076
Stryker Corporation, Stryker Neurovascular Division---------------------- $324,000

Sacramento Regional Office

ALLDATA, LLC --$96,080
Compassionate Care Home Health Agency, LLC ------------------------- $236,224
Flatiron West, Inc. --- $249,410

<u>Sacramento Regional Office</u> (continued)

Home Health Care Management, Inc. ---$99,450
Power Factor Electric, Incorporated --- $194,472

PROPOSALS APPROVED
BY DELEGATION ORDER FOR 11/28/17 – 1/12/18

<u>≤ $50,000</u>	Approved Date	Approved Amount
<u>North Hollywood Regional Office</u>		
Brickley Construction Company, Inc. dba Brickley Environmental	11/29/17	$49,764
Clima-Tech LLC	12/08/17	$49,920
Coast Medical Services, Inc., A Medical Group	12/22/17	$14,190
DALTA, Inc.	12/06/17	$33,374
GBC International Bank	01/08/18	$36,960
JMJK, Inc.	12/26/17	$30,470
Johnnie's Paint & Body Shop, Inc.	12/12/17	$25,740
Quality Refrigeration Company, Inc.	12/21/17	$38,720
Wilson Ivanova Certified Public Accountants, Inc., A Professional Accountancy Co.	12/12/17	$9,108
<u>San Diego Regional Office</u>		
Altura Associates Inc.	12/29/17	$29,224
Bearing Engineers, Inc.	12/11/17	$49,972
CPS Printing	12/01/17	$49,556
Emazing Lights, LLC	12/26/17	$49,296
HMWC CPAS & Business Advisors	12/08/17	$33,704
Hope by the Sea, Inc.	12/21/17	$24,336
Labeltronix, LLC	12/11/17	$49,920
M3 HVAC dba M3 Mechanical	12/12/17	$34,840
Mark Scheurer Architects, Inc.	01/10/18	$23,712
Method Technologies Inc.	12/20/17	$29,900
SCRAM of California	12/11/17	$44,550
Telaeris, Inc.	12/28/17	$10,400
Tuo Sogno Inc.	12/01/17	$49,608

San Francisco Bay Area Regional Office

NAC Insurance Administration Corporation dba CalNonprofits Insurance Services	12/11/17	$45,764
Springer Collision Centers dba Fix Auto	12/12/17	$49,764

Sacramento Regional Office

Bay Area Land Surveying, Inc.	12/11/17	$9,360
I. J. Larsen Pumps, Inc.	12/06/17	$10,504
Life-Assist, Incorporated	12/08/17	$34,980
Paragon Products Limited, LLC	12/08/17	$12,792
The Warden's Office, Inc.	12/11/17	$23,408
W. Banks Moore, Inc.	12/05/17	$39,000

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Panel Meeting of January 24, 2018

PRELIMINARY MATTERS

Directions to Meeting Site
Future Meeting Sites
Prior Meeting Minutes
Key Program Elements

REVIEW AND ACTION ON PROPOSALS

Panel Date: January 24, 2018

Panel Date: January 24, 2018

SUMMARY OF DELEGATION ORDERS

Delegation Orders	Tab
Altura Associates Inc.	
Bay Area Land Surveying, Inc.	
Bearing Engineers, Inc.	
Brickley Construction Company, Inc. dba Brickley Environmental	
Clima-Tech LLC	
Coast Medical Services, Inc., A Medical Group	
CPS Printing	
DALTA, Inc.	
Emazing Lights, LLC	
GBC International Bank	
HMWC CPAS & Business Advisors	
Hope by the Sea, Inc.	
I.J. Larsen Pumps, Inc.	
JMJK,Inc.	
Johnnie's Paint & Body Shop, Inc.	
Labeltronix, LLC	
Life-Assist, Incorporated	
M3 HVAC dba M3 Mechanical	
Mark Scheurer Architects, Inc.	
Method Technologies Inc.	
NAC Insurance Administration Corporation dba CalNonprofits Insurance Services	
Paragon Products Limited, LLC	
Quality Refrigeration Company, Inc.	
SCRAM of California	
Springer Collision Centers dba Fix Auto	
Telaeris, Inc.	
The Warden's Office, Inc.	
Tuo Sogno Inc.	
W. Banks Moore, Inc.	
Wilson Ivanova Certified Public Accountants, Inc., A Professional Accountancy Co.	

M e m o r a n d u m

To:	Panel Members	Date	January 24, 2018
From:	Stewart Knox Executive Director	File:	Panel Memo Doc.

Subject: **Directions to Meeting Site**

The Employment Training Panel will meet on <u>WEDNESDAY</u>, January 24, 2018 **at 9:30 a.m.**

New City Hall
Council Chambers, Room 1103, 1st Floor
915 I Street
Sacramento, CA 95814
Telephone (916) 327-5640 (ETP Central Office)
FAX: (916) 445-5972 (ETP Central Office)

Directions to the New City Hall Council Chambers

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**
- **915 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**
- **915 I Street**

M e m o r a n d u m

To: Panel Members	Date January 24, 2018
From: Stewart Knox Executive Director	File: Mtg. Site Memo

Subject: **Future Meeting Sites**

January 24, 2018	**New City Hall** **Time: 09:30 AM** **Council Chambers Room 1103** **951 I Street** **Sacramento, CA 95814**
February 22, 2018	**New City Hall** **Time: 09:30 AM** **Council Chambers Room 1103** **951 I Street** **Sacramento, CA 95814**
March 23, 2018	**California Environmental Protection Agency** **Time: 09:30 AM** **Sierra Hearing Room, 2nd Floor** **1001 I Street** **Sacramento, CA 95814**
April 23, 2018	**NO PANEL MEETING IN APRIL**

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
December 8, 2017

PANEL MEMBERS

Barry Broad
Chair

Janice Roberts
Vice-Chair

Gloria Bell
Member

Will Koch
Ex-Officio Member

Gretchen Newsom
Member

Jeff Robinette
Member

Sam Rodriguez
Member

Executive Staff

Stewart Knox
Executive Director

STATE OF CALIFORNIA
EMPLOYMENT TRAINING PANEL
Sacramento City Hall
California Environmental Protection Agency
1001 I Street, Sierra Hearing Room
Sacramento, CA 95814
December 8, 2017

I.   PUBLIC PANEL MEETING CALL TO ORDER

Chairman Barry Broad called the meeting to order at 9:30 a.m.

II.   ROLL CALL

Present
Gloria Bell
Barry Broad
Maricela Gomez on behalf of Will Koch - GoBIZ
Gretchen Newsom
Janice Roberts
Sam Rodriguez (arrived at 9:34 a.m.)

Absent
Jefferson Robinette

Executive Staff Present
Stewart Knox, Executive Director

III.   AGENDA

Chairman Broad asked for a motion to approve the Agenda.

Mr. Knox said, Tab #39 is withdrawn.

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

Motion carried, 5 - 0.

IV.   MINUTES

ACTION: Ms. Roberts moved and Ms. Newsom seconded the motion that the Panel
approve the Minutes from the October 27, 2017 meeting.

Motion carried, 5 - 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 October, we have a fairly large Panel Meeting today, a good portion on Consent, totaling approximately $10.4M with another $827,114K in Delegation Orders for a total just over $11.0M.

Today we have a mix of Single Employer and Multiple Employer Projects. Diana Torres, San Diego 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 six proposals in the last few months for over $900,000, one that was approved over $620,000 already leaving approximately $450,000 remaining for this year.

In regard to Core Funds for FY 2017/18, today the Panel will consider and additional $10.4M in projects and another $827K approved by Delegation Order. Should the Panel approve all the projects today, ETP will have approximately $32.0M 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, 25 projects were approved totaling just under $827K.

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 $62M with 252 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 $32M; $12M in allocation. Multiple Employer Contract (MEC): Regional Offices/AAU: requests are at $10M; $9M in allocations. Small Businesses have $4.7M in demand; $2.4M in allocations. Critical Proposals are at $20K in demand; $4.2M in allocations. Apprenticeship programs are at $1.2M in demand; $1.8M in allocations. Overall demand is approximately $49M.

The number of total projects in FY 2017/18 in the Regional Offices are 284; total number of projects in the Applications and Assessment Unit is 51; overall total of 335.

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 #27.

Applied Technologies Associates, Inc.	$238,500
Arc Mid-Cities, Inc.	$ 57,540
Armstrong Garden Centers, Inc.	$167,900
Capstone Fire Management, Inc.	$ 74,800
Cicon Engineering, Inc.	$109,440
Concrete Value Corp.	$247,140
CPH Hospital Management, Inc.	$172,800
Eaton Industrial Corporation	$ 77,976
Economic Development Collaborative-Ventura County	$101,820
Everett Graphics, Inc.	$148,716
Interior Experts General Builders, Inc.	$ 80,712
KRC Safety Co., Inc.	$ 73,280
LAX Coastal Area Chamber of Commerce	$247,993
Mesa Energy Systems, Inc.	$202,320
Novacap, LLC	$ 72,000
Owens Healthcare, Inc.	$137,230
Promise Hospital of East Los Angeles, L.P.	$ 84,700
Pyramid LA Management L.P. dba Sheraton Gateway Los Angeles Hotel	$221,550
Quad Knopf, Inc.	$ 73,892
Renovo Solutions, LLC.	$ 99,000
Setton Pistacio of Terra Bella, Inc.	$ 81,360
SST Construction, LLC	$ 168,000
Sun Valley Specialty Healthcare, Inc. dba Totally Kids	$100,800
Sunrise Medical (US) LLC	$237,181
The Nevell Group, Inc.	$ 77,520
The Technical School, Inc. dba Technical College	$166,460
Zuckerman Family Farms, Inc.	$112,906

ACTION: Mr. Rodriguez moved and Ms. Roberts seconded the motion to approve the consent calendar for Items #1 through #27.

Motion carried, 5 – 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: Ms. Roberts moved and Ms. Gomez seconded the approval to delegate
           authority to the Executive Director in event of a loss of quorum.

           Motion carried, 5 - 0.

VIII.   SUBCOMMITTEE REPORT

Madam Chair Gretchen Newsom reported as follows:

Our Subcommittee met yesterday from 1:30 P.M. to 4 PM. Approximately 50 attendees were present.   The main topics of discussion included the Interagency Agreement with the Department of Rehabilitation for work experience program for students of disabilities as well as nontraditional apprenticeships, guidelines and Substantial Contribution. This was followed by 30 minutes of free public comment on whatever topics the public desired. The majority of the meeting was spent discussing alternatives for Substantial Contribution. After listening to the stakeholders input, and Subcommittee Member comments, staff will bring two recommendations to the full Panel for consideration in January, 2018. We will set another date for another subcommittee meeting in January. I would like to thank the public for their comments and we will continue these conversations.

Mr. Broad said, we heard yesterday from the Director of Department of Rehabilitation regarding the possibility of contracting with us.   This would be outside of our normal funding, much like the AB 118 program where they have some funds that they would like to contract with us, only Department of Rehabilitation would potentially create programs for training youths with disabilities. What I would like to do with this idea is have the Subcommittee that met yesterday hear this idea in detail. There will be a public meeting the people can attend and comment on. The Subcommittee would make a recommendation to the full Panel as to how to proceed. It is not a legislative directive. It is a negotiation with the state agency so there are no set of guidelines that we could use or statute that would need interpretation. Therefore, I want to make sure that we thoroughly hear from our constituencies and the public before we move forward. As Chair of the full Panel, I am directing staff to move forward with the Department of Rehabilitation to work on this idea.

IX.   REVIEW AND ACTION ON PROPOSALS

Single Employers

Tab # 28 – Chevron Global Downstream, LLC

Ms. Torres presented a Proposal for Chevron Global Downstream, LLC (Chevron), in the amount of $744,732. Founded in 1911, Chevron is the second-largest integrated 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 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.

Ms. Torres introduced Victoria Stage, L&D Supervisor, Robert W. Taylor, Sr., Captain/SWP Specialist – HES/ Fire Department, and Rob Sanger of CMTA.

Chairman Barry Broad recused himself and left the room.

There were no questions from panel.

ACTION: Ms. Newsom moved and Mr. Rodriguez seconded approval of the proposal for Chevron Global Downstream. LLC, in the amount of $744,732.

Motion carried, 5 - 0.

Tab # 29 – CU Direct Corporation

Ms. Torres presented a Proposal for CU Direct Corporation (CU Direct), in the amount of $339,600. Founded in 1994 and headquartered in Ontario, CU Direct offers software solutions for credit unions and automobile dealers. Products include Credit Union Lending Solutions (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).

Ms. Torres introduced Erin Brown, Senior Manager, Training, and Brooke Perez of PWC.

Ms. Roberts said, is this your first contract is that correct? Ms. Brown said, yes.

Ms. Roberts said, I thought this was a lending institution but it's not. It's a technology apology institution.

Ms. Brown said, yes it is a technology institution. We are owned by credit unions. All of our board members are credit union members and all decisions made, are made by credit union members.

ACTION: Ms. Roberts moved and Ms. Newsom seconded approval of the proposal for
           CU Direct Corporation in the amount of $339,600.

           Motion carried, 5 - 0.

Tab # 30 – P2S Engineers, Inc.

Ms. Torres presented a Proposal for P2S Engineers, Inc., (P2S) in the amount of $290,520.
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 and Los Angeles, NBC Universal, Paramount Pictures,
Disneyland, Salk Institute, Siemens, Verizon, Applied Medical Research, Boeing, Aerospace
Corporation, 3M Pharmaceuticals and local governments.

Ms. Torres introduced Ashley Cruz, Human Resource Analyst.

There were no questions from the Panel.

ACTION: Ms. Roberts moved and Ms. Bell seconded approval of the proposal for P2S
           Engineers, Inc., in the amount of $295,520.

           Motion carried, 5 - 0.

Tab # 31 – The Cheesecake Factory Bakery, Incorporated

Ms. Torres presented a Proposal for The Cheesecake Factory Bakery, Incorporated (CFB), in
the amount of $504,000. 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.

Ms. Torres introduced Maria Mancha, Training Manager, Rick Lopez, Sr. Director of Human
Resources, and Bertha Soltara, Human Resources Trainer.

Ms. Roberts said, can you explain why you have 18% turnover?

Mr. Lopez said, we have had a variety of turnover regarding to some employees wanting to
find another position, some employees want to go to other areas of the country or back to
their home countries to do something different. We've had our typical folks that we've had to

terminate, or we have had a bunch of people that decided they wanted to do something else. We do have an 18% turnover but we continue to track and retain. We have some employees that have been there 30+ years. In fact, we have one person who the only one person in our entire Corporation that has more tenure than the founder and CEO of the company. So we have a person in the baking facility for 39 years.

Ms. Roberts said, your total in income is $2 million if I read all the zeros right. That seems pretty high to do contribution for all the training you do for that $2 million.

Ms. Mancha said, we are going to frontload a lot of training. We are getting new ovens getting new a lot of new equipment. Sophie factored that in. We knew that we were going to have to really train them the first part of the year so that's really where that's coming from. That effort is going to take about that much.

Ms. Roberts said, so you're asking for $500,000, from the previous contract which was only $171 million.

Ms. Mancha, said yes.

Ms. Roberts said, for these big jobs I want to see justification, my concern is that you have great training coordinators that administered $171,000, however, to administer 500,000 is kind of another story without any support other than your own Association there. Another thing is your wages. Your wages I see here is $11 up to $40/hr., but your health benefits applied are 50% of that. You obtain 50% of health benefits, $6 of benefits on $11/hr., without a union support?

Mr. Lopez said, what we are looking at that is the average we are paying for focus. What we have done with ETP funding is be very focused on benefits for people. If you take a look at what we provide and what the premiums are for people, we are very aggressive with making sure that they get the benefits that they need. So we do provide a lot of our funds into people's benefits.

Mr. Broad said, I think that's actually common in the restaurant and lodging industry for healthcare benefits, the wages are generally lower and so the healthcare is not a lower cost. Let me say this, the proposal here is you earned 70% last time and I understand the work issues. Typically, we right size these proposals. I don't think this one was for some reason. I don't think I can vote for the doubling of your money when you only earned 60% of your money last time.

Mr. Lopez asked, may I address that briefly?

Mr. Broad said, yes but let me tell you what I propose to do. I'm willing to bifurcate this and cut it in half. You can come back after you are well on your way to using the first half and let us know you are on your way to earning 100% of the money. If what happened last time or something occurs to dampen your ability to earn the money, then you have the option of not coming back, or you can come back and ask for less.

Mr. Lopez said, thank you I think that's more than fair for what you're proposing from my perspective. We had to put off the upgrades in 2017, and that caused us to come up short.

Ms. Roberts said, I agree with the Chairman that we should be looking at cutting this in half.

Mr. Lopez said, right now in our Calabasas facility we are still operating with 1990's technology. Right now we have 24 rack ovens and with those 24 rack ovens there is a lot of moving of our cakes onto racks that go in the ovens. We have to upgrade our refrigeration into a different configuration. We are calling for a state-of-the-art manufacturing facility, mimicking our Rocky Mountain North Carolina facility. We are upgrading our processing going from old technology to new technology.

Ms. Bell said, I agree with the Chairman on the right sizing, my question is more on the recruitment strategies. When you bring them on temp to hire do you put them on 100% on payroll?

Mr. Lopez said, we typically bring them on the front end for permanent to hire. We only use temp to hires if we are having troubles or challenges. For instance, potentially we have 30 shifts for sanitation. It is challenging to get people to work a third shift and it's challenging to work the sanitation piece. In that instance if we have a challenge of bringing on permanent people, we may look for temp to hire. Typically, we bring them on 60 to 90 days and then we will convert them after that. Ms. Bell said, thank you.

Mr. Broad said, I make a motion to approve this Proposal at a level of $252,000, with the right for them to come back and ask for the remaining $252,000, and only after they have shown they are substantially earning in the first half.

ACTION: Mr. Broad moved and Ms. Roberts seconded approval of the Proposal for the
            Cheesecake Factory Bakery Incorporated in the REDUCED amount of
            $252,000.

            Motion carried, 5 - 0.

Tab # 32 – CareMeridian, LLC

Ms. Torres, presented a Proposal for CareMeridian, LLC, (CareMeridian) in the amount of $281,200. 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.

Ms. Torres introduced Gretchen Adelmund, Director of Human Resources, and Bruce Claris from CareMeridian.

Ms. Roberts said, I really appreciate everything you're doing in this industry we fund a lot of healthcare facilities. How many locations are you looking at here?

Ms. Adelmund said, probably all 27 facilities, or at least 24 locations.

Ms. Roberts said, my concern is that you don't have any support on this. You have 27 facilities. You have never been in a contract here before. I would like you to get this money so you can do the things you want to do I'm just thinking that you might have some limited infrastructure with 27 facilities.

Ms. Adelmund said, yes we fully support and understand your concerns. We have administrative compliance meetings weekly that are held, so you will be capturing 4 to 5 hours per workweek with each of our individuals to keep you apprised of our progress.

Ms. Roberts said, the individuals at the locations are they nurses or are they temporaries?

Ms. Adelmund said, we have a lot of regulatory compliances that we have to maintain and keep and send the information to the corporate office. We do a lot of reporting and meetings that help keep this information flowing to the corporate office. We do a lot of follow-up, so yes, some or all of our employees that are participating in this program are administrative assistants, some are nurses, and then some are also have worked in the business or facility with us for a long time.

Ms. Roberts said, just keep really close contact with the staff on this. If you run into any problems, see what you can do to get the support because I like to fund these types of programs.

ACTION: Mr. Rodriguez moved and Ms. Bell seconded approval of the Proposal
            For CareMeridian, LLC, in the amount of $281,200.

            Motion carried, 5 – 0.

Tab #33 – GreatCall, Inc.

Ms. Torres presented a Proposal for GreatCall, Inc. (GreatCall), in the amount of $313,200. 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.

Ms. Torres introduced Renan Quiambao, Director of Training and Quality Assurance who was unable to attend due to an imminent evacuation in San Diego County to due to the fires. Michelle Rickner, Vice President of Training and Reimbursement Services was able to speak on Mr. Quiambao's behalf.

Mr. Broad said, I am happy to hear the proposal and vote on it, but if any Panel Members feel like we should put it over and vote on it next month that's fine with me. Please raise your hand and make that suggestion but given what that gentleman is going through the least we can do is hear it.

There were no questions from the panel.

ACTION: Ms. Roberts moved and Ms. Bell seconded approval of the Proposal
           For GreatCall, Inc., in the amount of $313,200.

           Motion carried, 5 - 0.

Tab #34 – Medata, Inc.

Ms. Torres presented a Proposal for Medata, Inc. (Medata) in the amount of $318,480. 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.

Ms. Torres introduced Dana Joanou, CPA, CFO, Medata, Tanisha Jackson, Project Manager with Corporate Tax Incentive, and Stephanie Banuelos, Manager, Corporate Tax.

Ms. Newsom said, could you detail for me what the differences between the customer service employees that are listed in Group 1 for a trainee and the JC customer service employees listed on the retrainee job creation? I note there is a difference in the wages, can you explain why?

Ms. Jackson said, they are looking to recruit, retain, and bring in customer service employees who will be at the lower wage. However, in this particular industry you do have to have that medical experience which, in turn, warrants the higher wage. Due to the nature of the different types of medical policies that they be familiar with whether it be in the medical industry, or whether it be for auto insurance, whether it be for some of the claims filings, that is where the difference is with the wages and why the wages are reflected that way.

Ms. Newsom said, so for the 15 new employees that you are hiring, are you doing anything to actively recruit Veterans, women, or minorities?

Mr. Joanou said, the founder's daughter is very involved in the business.

Ms. Roberts said, just expand on Ms. Newsom's question, the funds that are actually starting out at $13/hr we do see a wage progress once they get the information. Then they may move up to one of the customer service representatives at $17/hr. Is this correct?

Ms. Jackson said, yes.

ACTION: Mr. Broad moved and Ms. Roberts seconded approval of the Proposal for Medata, Inc. in the amount of $318,480.

Motion carried, 5 - 0.

Tab #35 – Orange County Global Medical Center, Inc. – WITHDRAWN

Tab #36 – Stryker Corporation, Stryker Neurovascular Division – WITHDRAWN

Tab #37 – Constellation Brands U.S. Operations, Inc.

Mr. Mazzone presented a Proposal for Constellation Brands U.S. Operations, Inc. (Constellation), in the amount of $505,350. 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 include premium spirits such as SVEDKA Vodka, Casa Noble Tequila and High West Wiskey. The Company will have 15 locations participate in training and will be led by its St. Helena location.

Franciscan Vineyards, Inc., is a grape grower and wine manufacturer headquartered in St. Helena. The Company will have nine locations participate in this Agreement.

Mr. Mazzone introduce Cheryl Hall, Director Talent Engagement, and Anne Ervin, Director Training Incentives, Tex Credit Companies.

There were no questions from Panel.

ACTION: Ms. Roberts moved and Ms. Bell seconded the approval of the Proposal for Constellation Brands U.S. Operations, Inc., in the amount of $505,350.

Motion carried, 5 - 0.

Tab #38 – Diamond Foods, LLC

Mr. Mazzone presented a Proposal for Diamond Foods, LLC (Diamond Foods) in the amount of $371,087. 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.

Mr. Mazzone introduced Hector Bolanos, Sr. Director of Human Resources, and Angela Jones, with Training Grants Intelligence, Vice President Development.

There were no questions from the panel.

ACTION: Ms. Bell moved and Ms. Roberts seconded the approval of the Proposal for Diamond Foods, LLC, in the amount of $371,087.

Motion carried, 5 – 0.

Tab #39 – Flatiron West, Inc. – WITHDRAWN

Tab #40 – Milestone Technologies, Inc.

Mr. Mazzone presented a Proposal for Milestone Technologies, Inc. (Milestone), in the amount of $656,439. Founded in 1997 and headquartered in Fremont, Milestone 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.

Mr. Mazzone introduced Nicki Graham, Service Delivery Executive.

Ms. Roberts said, I really commend you for looking at the Veterans program on this. Without any kind of administrative support. You have probably heard me say you completed 100% of a $444,000 with new job creations. You must have a really excellent staff or you yourself.

Ms. Graham said, I have a really wonderful training team. We had great support from the State and our advisors are wonderful. Thank you for acknowledging it.

ACTION: Ms. Roberts moved and Ms. Newsom seconded the approval of the Proposal
            for Milestone Technologies, Inc., in the amount of $656,439.

            Motion carried 5 – 0.

Tab #41 – The Neil Jones Food Companies

Mr. Mazzone presented a Proposal for The Neil Jones Food Companies dba Tomateck, Inc. (Tomateck), in the amount of $275,274. Founded in 1915 in Firebaugh, Tomateck 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. Training will take place at Tomatek's Firebaugh facility.

Mr. Mazzone introduced Eric Fortes, Director of HR; Felicia Knighton, Senior HR Manager.

Ms. Bell said, so the training is going to be at the Firebaugh facility? Ms. Knighton said, yes. Ms. Bell said, who is your HR person in Firebaugh? Ms. Knighton said, I am. Ms. Bell said, including Hollister? I am familiar with two locations. Ms. Knighton said, there is an HR manager in our Hollister location now.

Ms. Bell said, I understand that you are from Vancouver so that's a distance. Can you tell me how this is going to be managed from long distance and how are you going to keep abreast on the numbers, the metrics, and seeing how everything is going?

Mr. Fortes said, I am based in Vancouver and travel frequently to both California facilities. The administration and management is going to be primarily focused at the site under Ms. Knighton's direction and supervision. We have the resources there to be able to manage the program.

Ms. Bell said, I'm just asking you to really reach out. I'm not quite sure that you are right sized at the amount you were at because of the situation. You have great representatives who have helped you to this far. To be successful, I just ask you to keep reaching out and make sure you are on track and meeting your metrics under the contract.

Mr. Fortes said, thank you for that. We also have a resource at our corporate offices that is responsible for training at all of our facilities and she not only spearheads and helps to partner with the sites in terms of the corporate training initiatives that we have, but she will be in close communication and contact with us.

Ms. Roberts said, Ms. Knighton are you actually familiar with the ETP program or is this your first experience with ETP?

Ms. Knighton said, this is my first experience.

Ms. Roberts said, do you have any knowledge of the previous contracts that you've had in the previous 10 years and how your performance was on that?

Ms. Knighton said, I know we were 100% on one of the contracts. I know the other contract they were at 75%. I believe there was some transition back then. I do have two long-term employees that were here when the contract was being processed. We are aware of some of the issues.

Ms. Roberts said, so this question is to Mr. Fortes. On the retention period for seasonal employees this waiver, is this setting any precedent or is this something you've always done with seasonal workers?

Mr. Fortes said, it's in our pilot for seasonal workers we have always offered this. We have done his many times.

ACTION: Mr. Roberts moved and Ms. Bell seconded the approval of the Proposal for The Neil Jones Food Companies in the amount of $275,274.

            Motion carried 5 – 0.

Multiple Employer Contracts

Tab # 42 - California Manufacturing Technology Consulting

Ms. Torres presented a Proposal for the California Manufacturing Technology Consulting (CMTC), in the amount of $949,690. CMTC 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.

Ms. Torres introduced James Watson, President and CEO and Cheryl Slobidian, Director, Strategic Partnerships.

Ms. Roberts said, I just have one question. I normally don't get into all the employees that you're going to train because sometimes they are discretionary. The first one I looked at was Abel Industries. I know that Abel Industries is a company that supports disabled people. Do you have some kind of training program with Abel Industries?

Ms. Slobidian said, Abel is looking at continuous improvement in quality. They are continuing a project they started under the current contract and they will be continuing their training into the next one which is why we resubmitted them. They do quite a bit of reinforcement of quality in the line as they are doing the work.

Ms. Roberts said, I was just curious if this rehabilitation program.

Ms. Slobidian said, we do have small manufacturing clients that do hire disabled individuals. We work with Goodwill in Southern California on those programs. I'm not saying that there is a lot, but we do have an interest in it because we have employers that may be interested in it, depending on how the program rolls out. Of our 51 clients we are serving right now under this contract, 80% of them are small.

ACTION: Ms. Roberts moved and Mr. Rodriguez and Ms. Gomez seconded the
           Approval of the Proposal for California Manufacturing Technology
           Consulting in the amount of $949,690.

           Motion carried 5 – 0.

Tab #43 – Mt. San Antonio College

Ms. Torres presented a Proposal for Mt. San Antonio College (MTSAC), in the amount of $274,939. MTSAC 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, 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 of 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.

Ms. Torres introduced Paulo Madrigal, Director of Community and Contracts.

Mr. Broad said, I'm fine with the wage modification this time, however, I think for these Multi-Employer Agreements you guys get to pick. Maybe we need to start working on higher wage employers. I get if you come here and you are a single employer and operating in agriculture in the San Joaquin Valley, you might want to make wage modifications, but if you're a Multi-Employer Contract we are funding, we should start to move away from the lower wage occupations which the Panel is statutorily doing - funding higher wage training. That is a choice that you have to make. I think it's maybe evolving change in our philosophy. Maybe next year when you come back let's try to do it so you don't need wage modifications.

Ms. Gretchen said, I echo the Chairman's comments.

ACTION: Ms. Roberts moved and Ms. Newsom seconded the approval of the
                 Proposal for Mt. San Antonio College in the amount of $$274,939.

                 Motion carried 5 – 0.

Tab #44 – Southern California Roofers and Waterproofers Joint Apprenticeship and Training Fund

Ms. Torres presented a Proposal for the Southern California Roofers and Waterproofers Joint Apprenticeship and Training Fund (SoCal Roofers and Waterproofers JATF), in the amount of $449,801. Founded in 1959, the 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 in 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.

Ms. Torres introduced Guadalupe Corral, Coordinator, and Sandra Raiqoza, Project Administrator.

Ms. Roberts said, just a comment I think you're going to have a lot of work down in Southern California with roofing and waterproofing.

ACTION: Mr. Broad moved and Ms. Bell seconded the approval of the Proposal for
                 Southern California Roofers and Waterproofers Joint Apprenticeship and
                 Training Fund in the amount of $449,801.

                 Motion carried 5 – 0.

Tab #45 – California Tradeshow and Sign Crafts Joint Apprentices Training Trust Fund

Ms. Torres presented a Proposal for California Tradeshow and Sign Crafts Joint Apprentices Training Trust Fund (CA Tradeshow), in the amount of $297,240. Established in 2008, the CA Tradeshow 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.

Ms. Torres introduced Fred Wright, Training Coordinator, Steve Duscha of Duscha Advisories, and Oscar Mayer of the Los Angeles School District.

There were no questions from the panel.

ACTION: Ms. Roberts moved and Ms. Newsom seconded the approval of the proposal for California Tradeshow and Sign Crafts Joint Apprentices Training Trust Fund in the amount of $297,240.

Motion carried 5 – 0.

X.   PUBLIC COMMENT

There was no public comment.

XII.   MEETING ADJOURNMENT

Meeting adjourned at 10:38 a.m.

<u>Single Employer Contractor</u>

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

Advanced Bionics, LLC
18-0514

Panel Meeting Date:	01/24/2018
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:		$ 242,000.00	
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$ 242,000.00	N/A	$ 0.00	$ 264,030.00

APPLICANT PROFILE

Company Summary	Advanced Bionics, LLC (Advanced Bionics) (www.advancedbionics.com), is a global developer, designer and manufacturer of advanced cochlear implant systems. These products are used by individuals with severe-to-profound hearing loss determined by a healthcare provider.

Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	**State:** 643	**US:** 704	**World Wide:** 900
Turnover Rate (Applicant)	10.90 %		
Repeat Contractor	Yes		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Advanced Bionics provides employees training that will ensure the development and manufacture of high quality products to meet current global quality system regulations and standards for active implant medical device manufacturing. Technological innovation involving new devices and features drive the need for training.

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	$ 18.00	100	$ 1,800	8 - 200
2	Job Creation – Retrainee Initiative Program, Retrainee, Temp to Permanent	20	$ 20.00	200	$ 4000	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 1993, Advanced Bionics is headquartered in Valencia and has an additional facility in Sylmar. The Company develops cutting-edge cochlear implant technology to restore hearing to those with severe-to-profound hearing loss. Products include hearing aids, cochlear implants, and wireless communication solutions. All products are manufactured and designed in California.

This is Advanced Bionic's third ETP Agreement, the first 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	Changes in equipment, technology and processes require intensive, documented training and competency assessment for staff. This is especially true for staff working with surgically implanted hearing devices. Training will provide employees with best practices, knowledge, and skills to help the Company with market demand.
	Advanced Bionics has developed two dedicated career paths in manufacturing, with opportunities for advancement. Training will provide employees with the skills required to advance within a defined career path. Training will address skill gaps that are common with new employees which are due to the highly intricate job specifications. Job Creation employees will participate and complete 520 hours of training prior to producing these devices and systems (ETP funding up to 200 training hours, the rest at the Company's expense). Products are made with precious metals that are intricate and complex and require a high level of training. The training program will consist of welding, molding, critical processes, best handling practices, reinforcement, good manufacturing practices, manufacturing processes, and quality systems.
	Advanced Bionics has experienced significant growth due to demand for its advanced cochlear products and systems. This demand has led the Company to the recent expansion of its new facility in Sylmar and the addition of 20 new positions.
	Advanced Bionics annual California training budget is $300,000.

PROPOSED TRAINING PROJECT DETAILS

Training Infrastructure and Administrative Plan	Advanced Bionics Production Trainer and Senior Manager of Implantable Manufacturing will manage training plans and the training schedule for ETP training. The Director of Manufacturing will oversee the ETP program as a whole, with Human Resources providing information required for the enrollment and invoicing under this project. The Company has also retained Economic Incentives Advisory Group (EIAG) to assist with the administration of this project.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	Advanced Bionics has had no prior Agreements within the last five years, therefore Substantial Contribution does not apply.

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 Continuous Improvement and Manufacturing Skills.	

Delivery Method/Level	**Productive Laboratory**
Summary	
Production Staff will receive Productive Lab training in Manufacturing Skills. Training will be delivered mostly with a 1:1 trainer-to-trainee ratio, but the Contractor is requesting a trainer-to-trainee ratio of 1:3 to accommodate a few instances when scheduled training needs to be changed due to business demand.	

4. Additional Company or Training Project Details

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

Retrainee-Job Creation

Advanced Bionic's business is expanding due to increased demand for their advanced cochlear products and systems through more medical providers. Advanced Bionic's has committed to hiring 20 new Production staff employees (Group 2). The Company has already hired 2 employees and has retained 20 temporary employees who will be converted to permanent Production staff employees within six months.

PROPOSED TRAINING PROJECT DETAILS

To be eligible for reimbursement, trainees must be hired during the three-month period prior to Panel approval, or during the contract term. In support of job creation, newly hired employees will be subject to a lower post-retention wage.

Temporary-to-Permanent Hiring

Advanced Bionics intends to train 20 workers (Group Number 2) under Panel guidelines for the Temporary-to-Permanent program. The Company has retained these employees on a temporary basis, with the intention of hiring them into full-time, permanent positions after training. According to Advanced Bionics the average time for "converting" temporary workers into full-time permanent employment is 3 months. It is expected that these workers will receive employer-paid share-of-cost for healthcare premiums while on temporary status, and upon hire into full-time permanent employment.

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

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	Economic Incentives Advisory Group	Phoenix	N/A
Administrative	Economic Incentives Advisory Group	Phoenix	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

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	Quality Systems
Manufacturing Skills (ME) (Standard)	Assembly Handling Best Practices (AHBP)
	Best Handling Practice
	Cleanroom Best Practices (CRBP)
	Critical Process
	Current Good Manufacturing Processes (cGMPs)
	Electrode Handling Best Practices (EHBP)
	Ethylene Oxide Training (ETO)
	Molding
	NC Awareness
	Production and Manufacturing Skills
	Quality System Regulation (QSR)
	Reinforcement
	Safety and Environmental Management System (SEMS)
	Silicon Adhesive Awareness (SAA)
	Soldering
	Welding

Delivery Method /Level	Productive Laboratory
Training Type (Level)	**Planned Course Offerings**
Manufacturing Skills (ME) (Standard)	Assembly Handling Best Practices (AHBP)
	Best Handling Practice
	Cleanroom Best Practices (CRBP)
	Critical Process
	Current Good Manufacturing Processes (cGMPs)
	Electrode Handling Best Practices (EHBP)
	Ethylene Oxide Training (ETO)
	Molding
	NC Awareness
	Production and Manufacturing Skills
	Quality System Regulation (QSR)
	Reinforcement
	Safety and Environmental Management System (SEMS)
	Silicon Adhesive Awareness (SAA)
	Soldering
	Welding
PL Justification and Details	
Explain the need for productive laboratory (PL) training	The proposed project will focus on the production staff. Production staff are responsible for producing biomedical technology products. Products are extremely fragile, made with other technology and precious metals. Ultimately, the products are part of system that includes an

Attachment 2 - Training Delivery and Curriculum Listing

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

	implantable device. The preciseness of the products is extremely regulated to ensure the highest quality and effectiveness. The dedicated people in manufacturing who build our products receive hundreds of hours of intense
Describe the Equipment/Processes to be used in delivering the PL training	An internal quality and/or certification process is used to train each production staff team member. Each trainee participates in a forum where they view actual witness testimonials to fully understand the outcomes of their work. The trainee participates in classroom training, lab training, and then in PL. PL is delivered in a clean room environment with a qualified or certified trainer. Process steps are followed, mentored and monitored by the trainer. PL can last up to 3 months for some positions.
Describe Trainer Qualifications	A Qualified Trainer is an employee who is the Subject Matter Expert (SME) for a particular function or a designated Trainer by his or her qualifications (i.e. an Engineer, Supervisor, or Group Lead). A Qualified Trainer may only conduct training that is appropriate to his or her knowledge and expertise. A SME is an employee who has been designated by a Manager or Supervisor as a qualified expert in a particular area. Training for certifications is limited to trainers meeting specific qualifications.

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	

Critical Proposal
Retrainee - Job Creation
Training Proposal for:

Aemerge RedPak Services Southern California, LLC

Small Business

ET18-0164

Panel Meeting of: January 24, 2018

ETP Regional Office: San Diego　　　　**Analyst:** R. Swier

CONTRACTOR

- Type of Industry:　　　　　　　　　　Manufacturing

  　　　　　　　　　　　　　　　　　Green Technology

  　　　　　　　　　　　　　　　　　Priority Industry: ☒ Yes ☐ No

- Number of Full-Time Employees

  　　　　　　　　　　　California:　8

  　　　　　　　　　　　Worldwide:　9

  　　　　　Number to be trained:　25

  　　　　　　　　　　　　　　　　　Owner ☐ Yes ☒ No

- Out-of-State Competition:　　　　　Competitors Outside CA
- Special Employment Training (SET):　☐ Yes ☒ No
- High Unemployment Area (HUA):　　☒ Yes ☐ No
- Turnover Rate:　　　　　　　　　　0%
- Repeat Contractor:　　　　　　　　☐ Yes ☒ No

FUNDING

- Requested Amount:　　　　　　　$68,250
- In-Kind Contribution:　　　　　　$69,800

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 Job Creation Initiative SB <100 Priority Rate Critical Proposal	Business Skills, Computer Skills, Commerical Skills, Continuous Impr, HazMat, Mfg Skills, PL-Mfg Skills	15	8-200 Weighted Avg: 105	0	$2,730	$13.66
2	Retrainee SB <100 Priority Rate Critical Proposal	Business Skills, Computer Skills, Commerical Skills, Continuous Impr, HazMat, Mfg Skills, PL-Mfg Skills	10	8-200 Weighted Avg: 105	0	$2,730	$16.70

- Reimbursement Rate: $26 SB Priority
- County(ies):   San Bernardino
- Occupations to be Trained: Administrative, Production, Sales, Management
- Union Representation: ☐ Yes
                                   ☒ No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: N/A
- Administrative Services: N/A
- Training Vendors: To Be Determined

CRITICAL PROPOSAL

This proposal for Aemerge RedPak Services Southern California, LLC (RedPak) (http://aemergeRedPak.com) is designated as a "Critical Proposal" by the ETP Executive Director (Title 22, California Code of Regulations (CCR) 4402.2.) RedPak is starting operations with the construction of a new manufacturing plant. This project will assist RedPak to develop job skills for new and existing workers.

OVERVIEW

Founded and located in Hesperia, RedPak is a medical waste processing company that diverts medical waste away from landfills. Its processes carbonizes and renders all non-metal waste unrecognizable, recycles metals, and generates clean energy. The Carbonizer is the first and

only approved commercial medical waste processing system in California that can process all types of medical waste, including incinerables. Construction of this first-of-its-kind operation was recently completed and full operations started in December 2017. The plant's overall capital investment is $55 Million and will create 25 full times jobs in an ETP-designated HUA.

Green/Clean Operations

Since 2001 approximately 720 million pounds of California's medical waste requiring high heat treatment has been trucked across the country for treatment and ultimately disposed of in landfills. Besides saving the State millions of dollars on shipping costs, using RedPak to process medical waste (approved by the CA Department of Public Health) provides additional benefits:

- Diverts 95% of treated medical waste from landfill disposal;
- Recycles treated metals which currently end up in landfills;
- Generates 1.25 MW of clean power;
- Greatly reduces emissions from hauling; and
- Reduces release of harmful toxins released during incineration.

Training Plan

The facility, technology and employees are all new. Therefore, all employees will need extensive training on equipment and processes/procedures. RedPak will utilize in-house subject-matter experts and vendors as trainers.

Business Skills – This training will be offered to all occupations. Training on communications, customer and vendor relationships, and services provided will give trainees the ability to provide a superior customer experience. Business process training will also be provided to Administrative on policies and procedures.

Computer Skills – Production Staff will be trained on the use of handheld computers linked to the ERP system for timely and accurate receipt and disposal of medical waste. Administration Staff will receive training on all functions of the ERP system as well. Production Staff will learn the Distributed Control System (DCS) and HMI to control and monitor equipment.

Commercial Skills – Production Staff will be trained in non-manufacturing work processes such as air permit compliance, waste water treatment, and continuous emission monitoring systems.

Manufacturing Skills – Training will be provided to Production and Management staff in the following skills: Equipment Operations, Maintenance, Controls, Troubleshooting. Trainees will learn process flow for each piece of equipment. Additionally, all Production Staff will need a basic level of maintenance training. This training will be delivered in both a classroom and productive lab manner.

Continuous Improvement – This training will be offered to all occupations. Lean Manufacturing and Six Sigma will help develop a culture of continuous improvement throughout.

Hazardous Material – This training will be provided to all occupations working on or around hazardous materials including the medical waste and chemicals used to treat water.

Productive Lab (PL)

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

Trainees will receive PL in Manufacturing Skills to acquire skills to operate equipment. The equipment is complex and potentially dangerous/hazardous, and procedures are unique. The Carbonizer is designed to process organic waste in a negative pressure, no oxygen environment with high heat. With this technology, medical waste is converted to syngas, which is used to generate clean energy. Employees will be trained to optimize operation of each piece of equipment, including the Carbonizer, the Thermal Oxidizer, boiler, and air quality bag house. RedPak has identified the need for up to 120 hours of PL training; however, the Company is requesting 60 hours of ETP-funded PL in this proposal. Training will be provided by experienced management and staff and will be conducted on the production floor. Productive Lab will be formally evaluated using a checklist of competencies.

In addition, some equipment will require small groups of three employees to run. The Company is requesting a 1:3 trainer-to-trainee ratio for these equipment.

Modifications

Increase Maximum Training Hours for Small Business

RedPak request to increase the Small Business maximum hours cap from 60 to 200 hours. The Company performed a needs assessment and found that many new employees will need more than 200 hours in various skill sets to successfully support the Company's highly technical operations. The increase in the maximum hours will provide workers with extensive technical skills.

HUA Wage Waiver

Although the contractor is located in an ETP HUA, RedPak is not seeking an HUA wage modification.

Training Infrastructure

In order to prepare RedPak's newly hired workforce, employees will be trained on the operations of the equipment, the instruments used to monitor the equipment, and the control environment used to monitor the equipment. Training will be provided from both in-house staff and outside training vendors utilizing both Class/Lab and PL.

<u>RECOMMENDATION</u>

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum

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

BUSINESS SKILLS
- Communications/Customer Relations
- Financial Processes
- Inventory Controls
- Overview of the service we provide

COMPUTER SKILLS
- Epicor – ERP System
- MS Office (intermediate/advanced)
- Handheld Computer/scanner
- Control System Interface and Monitoring

CONTINUOUS IMPROVEMENT
- 5S
- Lean Manufacturing
- Continuous Cost Improvement
- Process Improvement

HAZARDOUS MATERIALS
- HazMat Handling
- Emergency Response

COMMERCIAL SKILLS
- Air Permit Compliance
- Waste Water Treatment
- Continuous Emissions Monitoring Systems
- Sales skills/techniques

MANUFACTURING SKILLS
- Equipment Operation
- Maintenance & Troubleshooting
    a. Mechanical
    b. Preventive Maintenance Techniques
    c. Control Systems and Devices
- Process Flow
- Standard Operating Procedure
- Mobile Equipment Training
- Understanding Schematics and Piping and Instrumentation diagram(P&ID's)
- Chemical Analysis of Process Water

Productive Lab
0-60

MANUFACTURING SKILLS (1:3 Trainer-to-Trainee Ratio)
- Equipment Operation, Maintenance & Troubleshooting
- Water Treatment Operation
- Shadow Controller on Financial functions

Note: Reimbursement for retraining is capped at 200 total hours per-trainee, regardless of method of delivery. PL is capped at 60 hours per-trainee.

TRAINING PROPOSAL FOR

ALLDATA, LLC
18-0607

Panel Meeting Date:	January 24, 2018
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:		$96,080.00	
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$96,080.00	N/A	$0.00	$500,000.00

APPLICANT PROFILE

Company Summary	ALLDATA, LLC (ALLDATA) is a software provider for repair information connected to Original Equipment Manufacturer (OEM) parts and services for the automotive and collision repair industries.

Industry Sector(s)	Information		
Priority Industry	Yes		
No. Employees (Applicant)	**State:** 412	**US:** 412	**World Wide:** 412
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 further developing staff's computer skills to improve project management and customer service efficiencies. In addition, training will include new company products, such as Gen3 and Enhanced Diagnostics, which are new products that will be introduced to the market in 2018.

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	190	$18.00	24	$432	8 - 200
2	Job Creation – Retrainee Initiative Program, Retrainee	25	$20.00	28	$560	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1986 and located in Elk Grove, ALLDATA specializes in online software development for OEM repair and service businesses in the automotive services industry. As technology in this industry continues to evolve, ALLDATA is focused on creating software that continuously compiles the largest single source of OEM information available. Automotive repair businesses utilize ALLDATA software for repair services, shop management, creating repair estimates, parts ordering, and for appointment scheduling.

The Company's software products include programs such as ALLDATA Repair, ALLDATA Collision, ALLDATA Manage Online, ALLDATA Mobile, ALLDATA Tech-Assist, ALLDATA Training Garage and ALLDATA DIY. These software programs are used by over 300,000 experienced technicians in 80,000 shops worldwide. Customers range from large national automotive companies, such as, Firestone, AAMCO, and Jiffy Lube to smaller scale collision and mechanical repair shops worldwide.

ALLDATA is a subsidiary of AutoZone, Inc. and training will take place at the Company's single location in Elk Grove.

2. Current Training Project Details

Purpose of Training	This is ALLDATA's second ETP Agreement, and the second in the past five years. The previous agreement provided training in software programs such as Oracle Database, Smartlogic, and MySQL. Training for this Agreement will continue to enhance staff's computer skills by focusing on upgrades to next generation software utilized throughout the organization. Even though some training topics are similar to the prior Agreement, trainees will not receive duplicate training.
	Training is required to support the upgrades to the Company's current internal systems, such as EBRS Tools, PeopleSoft, and MS Dynamics. EBRS Tools software focuses in the Technical Assistance function, while PeopleSoft and MS Dynamics software are used for project management and cost tracking functions. Training will increase sales, improve customer support, and expand staff's product knowledge.
	In addition, training will be provided to staff in ALLDATA's new external software products Gen3, Gen3 - Wiring Diagrams and Enhanced Diagnostics. These software products will be released in early 2018 and provide an improved search navigation option for all automotive contents related to repairs, parts, and data. The software will also allow customers to give more accurate repair diagnoses and repair cost estimations. Training in the new software is essential for staff to provide accurate and efficient customer support.

PROPOSED TRAINING PROJECT DETAILS

Training Infrastructure and Administrative Plan	Training will be led by the Company's Human Resources Director and will have the support of six HR staff members. The HR team is committed to the implementation of the training plan, as well as, all administrative requirements of the program. The Company has four dedicated in-house trainers to work closely with management on the arrangement and documentation of training. Training will be delivered by in-house experts and vendors as needed. ALLDATA has retained Propel Consulting Group to assist with administration.
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 and Computer Skills as shown in 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.

- $20 for all delivery methods, except for CBT, which is reimbursed at $8 per hour.

ALLDATA has committed to hiring 25 new employees to support business needs. The Company is releasing new software products and has increased the number of clients using their software. Due to increased demand, ALLDATA is creating new positions in all areas of the organization.

The date-of-hire for trainees in the Job Creation program will be within the three-month period before contract approval or within the term of the contract. These trainees will be hired into "net new jobs" as a condition of the contract.

PROPOSED TRAINING PROJECT DETAILS

4.2 Subcontractor Summary

ALLDATA has retained the services of the following Subcontractor.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Propel Consulting Group	El Dorado Hills	$5,000
Administrative	Propel Consulting Group	El Dorado Hills	13% of payment earned
Training	To Be Determined		

4.3 Previous ETP Project Summary

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
ET16-0203	Elk Grove	10/01/2015 - 09/30/2017	$144,000	$93,899	65%
Notes	ALLDATA's performance was less than projected due to the lack of an administrative and implementation plan for training. The HR Director, who assisted in the development of the proposal, was replaced with five months remaining to train. ALLDATA replaced the HR Director and retained the services of an administrative contractor to assist with the administration requirements. The Company's new HR Director prioritized training needs and oversaw training implementation. In the remaining five months of the Agreement, performance increased from 10% to 65%. The same HR Director will oversee the training in this new proposal. To ensure performance, ALLDATA completes a bi-weekly training report which is reviewed by management. Training is supported by a well-developed plan. New leadership has emphasized the importance of training and focused the agency on employee development.				

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	Automotive Consulting
	Automotive Industry
	Automotive Service Excellence
	Business Acumen
	Business Analysis
	Business Performance
	Communication Skills
	Conflict Resolution
	Customer Service
	Demos and Closures
	Final Segmentation
	Finance and Accounting Techniques
	Leadership Skills
	Marketing and Automation
	Negotiation Skills
	New Sales Rep Bootcamp
	Phone Technical Support
	Pipeline Account Management
	Presentation Skills
	Pricing Strategies
	Problem Solving and Decision Making
	Product and Business Retention
	Product R and D Techniques
	Project Management
	Sales Skills
	SalesForce Admin Essentials
	Team Building
	Time Management
Computer Skills (Standard)	Adobe
	Agile
	Copy Writing
	Database Management
	Doc Platform Training- Products and Industry Standards
	EBRS Tools System
	Email Technical Support
	Enhanced Diagnostics
	Gen3 - Wiring Diagrams
	Gen3 Software
	Graphic Design
	Help Desk Institute

Attachment 2 - Training Delivery and Curriculum Listing

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

Info As Service
Intermediate/Advanced MS Office
IT - Agile Software Life Cycle
IT - DEVOXX (DTE)
IT - Infrastructure Life Cycle
IT - Oracle Database
IT Development
IT Management
IT QA Assurance
IT Scrum Master
Microsoft/Cisco
Mobile Apps
MS Dynamics
Peoplesoft
Product Upgrades
Products Training
UX and Visual Aids
Web Development
Wiring Diagrams

STATE OF CALIFORNIA
ETP
EMPLOYMENT
TRAINING PANEL

Retrainee – Job Creation

Training Proposal for:

Compassionate Care Home Health Agency, LLC

Agreement Number: ET18-0159

Panel Meeting of: January 24, 2018

ETP Regional Office: Sacramento   **Analyst:** K. Smiley

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate SET HUA Medical Skills Training Job Creation	Industry Sector(s):	Healthcare
			Priority Industry: ☒ Yes ☐ No
Counties Served:	Fresno	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 110	U.S.:110	Worldwide: 110
<u>Turnover Rate</u>:	10%		
<u>Managers/Supervisors</u>: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
$236,224		$0	$0		$ 236,224

In-Kind Contribution:	100% of Total ETP Funding Required	$350,000

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 Priority Rate SET HUA Medical Skills	Cont. Imp., Computer Skills, MS-Preceptor, MS-Didactic	76	8-200 Weighted Avg: 92	0	$1,656	*$12.53
2	Retrainees Priority Rate Job Creation Medical Skills SET HUA	Cont. Imp., Computer Skills, MS-Preceptor, MS-Didactic	60	8-200 Weighted Avg: 85	0	$1,700	*$11.00
3	Retrainees Priority Rate SET HUA	Cont. Imp., Computer Skills	3	8-200 Weighted Avg: 92	0	$1,656	*$12.53
4	Retrainees Priority Rate Job Creation SET HUA	Cont. Imp., Computer Skills	2	8-200 Weighted Avg: 85	0	$1,700	*$11.00

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

Minimum Wage by County: Job Numbers 1 & 3 (SET/HUA): $12.53 per hour in Fresno County; Job Numbers 2 & 4 (SET/HUA/Job Creation): $11.00 per hour in Fresno County

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Certified Home Health Aide		2
Therapist		22
Registered Nurse		20
Licensed Vocational Nurse		13
Medical Social Worker		3

Intake Coordinator		5
Therapy Assistant		11
Job Number 2		
Registered Nurse		9
Administrative Staff		1
Certified Home Health Aide		3
Therapist		21
Therapy Assistant		8
Licensed Vocational Nurse		12
Medical Social Worker		3
Intake Coordinator		3
Job Number 3		
Administrative Staff		3
Job Number 4		
Administrative Staff		2

INTRODUCTION

Founded in 2003 and located in Fresno, Compassionate Care Home Health Agency, LLC (Compassionate Care) is a Home Health Agency (HHA) that provides in-home, skilled nursing services to the elderly and infirmed. Compassionate Care provides rehabilitative and therapeutic services that include physical, speech and occupational therapies. In addition, the Company provides social services that engage patients and increase quality of life. The Company is Medicare and Medi-Cal Certified, and licensed by the Department of Public Health of California. Training will take place at its single facility in Fresno.

PROJECT DETAILS

This will be Compassionate Care's First Agreement. Training will focus on recent healthcare industry changes including the Affordable Healthcare Act, and the Center for Medicare and Medicaid Services (CMS) Home Health Quality Reporting Requirements system.

The Affordable Care Act has resulted in new quality standards, decreased reimbursement for services, increased patient population, and increased the number of high acuity patients receiving rehabilitative care. More than 80% of Compassionate Care's referrals come from acute care hospitals. Training is required to ensure workers have the skills and knowledge to manage multiple patients with a higher level of acuity. Medical Skills training will help improve clinical outcomes and reduce patient re-admittance.

In 2016, the CMS unveiled major changes to HHA's reporting of quality care data for its patients and staff. HHAs are mandated to report this data to Home Health Care Consumer Assessment of Healthcare Providers and Systems Survey to assess quality of patient care. Compassionate Care's staff need training to ensure new CMS quality standards and guidelines are met and the Company can continue to serve Medicare and Medicaid patients. The assessment information will also be made available to prospective clients. Training will ensure staff meet CMS quality standards and are able to provide first-rate care to patients.

Retrainee - Job Creation

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be reimbursed at a higher rate and trainees will be subject to a lower post-retention wage. Compassionate Care has committed to hiring 62 new employees (Job Numbers 2 and 4). Job Creation trainee occupations include Registered Nurse, Certified Home Health Aide, Administrative Staff, Therapist, Therapy Assistant, Licensed Vocational Nurse, Medical Social Worker, and Intake Coordinator.

Due to a shortage of home health services in King and Kern counties, Compassionate Care expanded its service into these areas in October 2017 and has contracted with 80 new clients to provide services in January 2018. Compassionate Care projects increased clients in these counties by January 2019. The Company is also expanding services to include End-of-Life Hospice care to clients and their families. To meet this demand, the Company must significantly increase in staff.

The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

Training Plan:

Training will be delivered by in-house experts via class/lab, didactic and preceptor delivery methods.

Medical Skills Training

The Panel has established a higher reimbursement rate for nurse upgrade training, recognizing the higher cost of delivery for the Clinical Preceptor and Didactic models.

Medical Skills Training – Didactic: Therapists, Licensed Vocational Nurses, Registered Nurses, Therapy Assistants, Medical Social Workers and Home Health Aides will receive Medical Skills didactic training to improve patient care. Courses include Diabetic Management, Post-surgery Orthopedic and Neurological Rehabilitative Care, Medication Monitoring/Evaluation, Patient and Family Care Education, Physical Therapy, Occupational Therapy, Speech Therapy, Home Health Aide Services and Medical Social Services.

Medical Skills Training – Preceptor: Therapists, Licensed Vocational Nurses, Registered Nurses, Therapy Assistants, Medical Social Workers and Home Health Aides will receive bedside medical skills training with a Preceptor. All workers will train with Preceptors to validate skills, and become familiar with patient acuity levels. Courses include Patient Assessment & Care, Intravenous Therapy, Medication Administration & Management, Dementia Care and Enteral Feeding Tube Management.

Computer Skills: Training will be offered to all occupations in the new Electronic Medical Records system to accurately enter and retrieve patient information. Staff will also receive training on Microsoft Office, Kinnser and OASIS.

Continuous Improvement: Training will be offered to all occupations in multiple skills such as team building and customer service. Courses including Greif and Bereavement, National Patient Safety Goals, Team Building and Problem Solving.

Commitment to Training

The Company's current training budget is approximately $100,000 per year. Training programs include new hire orientation, sexual harassment prevention, safety and computer skills training.

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

➢ Training Infrastructure

Compassionate Care's Chief Operating Officer (COO) will oversee the training plan and will work with department leads on implementation. In addition, two training coordinators will schedule and coordinate all training efforts for staff and an administrative assistant will work with trainers on all training record keeping documents. On a monthly basis, the training progress will be reported back to the COO.

To assist with new staff, Compassionate Care has two hiring coordinators to bring on an estimated three new hires per month. The Company has also retained National Training Systems Inc. to assist with the administrative duties. A training plan is in place and will begin upon approval.

Retention Modification

Compassionate Care considers employees that work 30 hours per week or more full-time staff. Trainees that work more the 30 hours per week are offered full-time benefits such as Medical, Dental and 401K benefits. The company is requesting to reduce the full-time requirement from 35 hours per week to 30 hours per week.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

National Training Systems Inc. (NTS) in Ladera Ranch assisted with development for a flat fee of $18,858.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200   Trainees may receive any of the following:

COMPUTER SKILLS
- Clinical Services System Management
- Electronic Medical Records Application Skills
- Kinnser
- Consolo
  - OASIS
- MS Office Suite (Intermediate & Advanced ONLY)
  - Word
  - Excel
  - PowerPoint

CONTINUOUS IMPROVEMENT
- Communication Skills
- Coordination of Care
- Customer Service
- Case Management
- Documentation Skills
- Interdisciplinary Team Process
- National Patient Safety Goals
- Problem Solving
- Team Building
- Quality Assessment and Improvement
- Psychological and Spiritual Related to Death
- Activities of Daily Living
- Behavior Management
- Grief and Bereavement

MEDICAL SKILLS TRAINING – DIDACTIC
- Advanced Cardiac Life Support
- Patient Advanced Directives
- Arterial Blood Gas Interpretation
- Assessing Cardiac Changes
- Assessing Respiratory Function
- Basic Life Support
- Body Mechanics
- Cardiac Conditions
- Care of the Pleurx Patient
- Central Venous Access Devices
- Center for Medicare Services Compliance Updates
- Concepts of Death and Dying
- Dementia Care
- Depression
- Diabetic Management
- Disease Management
- Electrolyte Imbalance

- Elder Abuse
- Enteral Feeding Tube Management
- End-of-Life Care
- Medical Equipment Skills
- Functional Mobility & Ambulation
- Gastrointestinal Assessment & Management
- Handling of Death in a Home
- Medical Waste Management
- Home Care
- Hospice Skills
- ICD-10 Coding
- Incontinence Management (Colostomy Care, Urinary Catheter)
- Infection Control
- Intravenous Therapy
- Influenza Vaccination
- Medication Administration & Management
- Neurological Conditions
- Clinical Orientation
- Occupational Therapy Skills
- Orthopedic Conditions
- Pain Management (Acute & Chronic)
- Palliative Care
- Patient Assessment & Care
- Patient Fall Prevention
- Patient Transfer Techniques
- Physical Therapy Skills
- Pressure Ulcers
- Point-of-Care Laboratory Testing
- Rehabilitation Skills
- Respiratory Care
- Speech Therapy Skills
- Supplies, Medical Gasses and Drugs
- Tracheotomy Care
- Urinary Management (Foley Catheter, Input/Output)
- Wound Management
- Wound Vac Therapy

MEDICAL SKILLS TRAINING – PRECEPTOR
- Patient Assessment & Care
- Dementia Care
- Diabetic Management
- Enteral Feeding Tube Management
- Medical Equipment Skills
- Infection Control
- Intravenous Therapy
- Medication Administration & Management
- Wound Care
- Rehabilitation Skills
- Body Mechanics
- Functional Mobility & Ambulation

- Infection Control
- Neurological Conditions
- Occupational Therapy Skills
- Orthopedic Conditions
- Patient Assessment & Care
- Physical Therapy Skills
- Rehabilitation Skills
- Speech Therapy Skills

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

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

RETRAINEE - JOB CREATION

Training Proposal for:

Flatiron West, Inc.

Agreement Number: ET18-0144

Panel Meeting of: January 24, 2018

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: ☒ Yes ☐ No	
Counties Served:	Solano, San Deigo, San Bernardino		Repeat Contractor:	☒ Yes ☐ No	
Union(s):	☒ Yes ☐ 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	
Turnover Rate:	13%				
Managers/Supervisors: (% of total trainees)	1%				

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
$249,410		$0	$0		$249,410

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

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours Class / Lab	CBT	Average Cost per Trainee	Post-Retention Wage
1	Retrainee Priority Rate SET	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, HAZMAT, HAZWOPER, OSHA 10/30	357	8-200 Weighted Avg: 35	0-25	$630	$22.77
2	Retrainee Job Creation Initiative Priority Rate SET	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, HAZMAT, HAZWOPER, OSHA 10/30	35	8-200 Weighted Avg: 35	0-25	$700	$13.66

Minimum Wage by County: Job Number 1: (SET/Priority Industry): $22.77 per hour; Job Number 2: $14.19 per hour for San Diego County and $13.66 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 and 2.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Administrative Staff		47
Engineer		63
Estimator		17
Laborer		100
Mason		20
Carpenter		38
Machine Operator		6
Project Leader		54
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 Strom 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

<u>OSHA 10/30.</u> 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.

<u>Hazardous Waste Operations and Emergency Response Standard (HAZWOPER)</u>. 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.

<u>Hazardous Materials (HAZMAT)</u>**.** 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)
- Delteck 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.

TRAINING PROPOSAL FOR

Giroux Glass, Inc.

17-0912

Panel Meeting Date:	01/24/2018
Regional Office:	North Hollywood Regional Office
Analyst Name:	Lan Vuong
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: $73,920.00			
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$73,920.00	N/A	$0.00	$110,300.00

APPLICANT PROFILE

Company Summary	Giroux Glass, Inc. (GGI) (www.GirouxGlass.com) is an employee-owned company engaged in glass fabrication and installation for residential, commercial, private and public facilities.

Industry Sector(s)	Construction
Priority Industry	Yes
No. Employees (Applicant)	**State:** 157 **US:** 214 **World Wide:** 214
Turnover Rate (Applicant)	6.00 %
Repeat Contractor	Yes
High Unemployment Area	Yes
Union(s)	District Council 16/Local Union 294 International Union of Painters and Allied Trades; and District Council 36 Local 636 Glaziers, Architectural Metal & Glassworkers Union.

TRAINING PROFILE

Training Objective(s)	GGI is currently implementing new software and products to keep pace with technology and meet customer demand to remain competitive. GGI has also partnered with an architectural panel manufacturer, Centria, to provide aluminum panels. In this proposal training designed to enhance GGI's competitiveness in the industry by focusing on new technology and products, improving operations and customer service, and increased sales.

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	$18.00	56	$1,008	8 - 200
2	Job Creation – Retrainee Initiative Program, Retrainee	3	$20.00	56	$1,120	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1946 and headquartered in Los Angeles, GGI is a Women Business Enterprise-certified glass, glazing and architectural metals contracting company with branches in Los Angeles, San Bernardino, Fresno and Las Vegas. GGI offers a variety of glass design, installation, fabrication, repairs, replacements and improvements to glass and hardware in commercial and residential structures such as custom windows, curtain walls, doors, skylights, showers and historical buildings.

Major projects include the Cain Library at the California State University of Dominguez Hills, the Los Angeles Unified Central Learning Center, the Skywalk at the Grand Canyon, the City Center and a one-of-a-kind fountain filled with chocolate in Las Vegas, Getty Center in Los Angeles, Southwest Airlines at LAX airport, Bullard High School in Fresno, Kaiser in Chino Hills, Union Bank in Glendale and Tulare County Office in Visalia.

Training will take place at its facilities in Fresno, Los Angeles, San Bernardino and local worksites.

2. Current Training Project Details

Purpose of Training	This will be GGI's third ETP Agreement, and the third in the last five years. In the previous proposal incumbent workers were trained on business operations, production efficiencies, and internal systems. For this proposal, GGI will focus on new technologies and new product skills, internal software for its new employees, and more complex operation and technical skills for its workforce. Process improvement and customer service training will continue, but at a much higher level. Training from prior ETP projects will not be duplicated.
	As business and workforce grow, GGI must train its employees to accommodate various business needs, products and services. The Company must expand its infrastructure and products, increase operations, upgrade worker job skills and adapt to new technology. The Company is currently implementing two new software systems AboutTime and DOMO, which will streamline timecard, payroll, financial reporting and eliminate hard copy documentation; and integrate new product, aluminum panels to meet customer demands.
	Workers will receive skills necessary to better understand customer requirements, deliver sophisticate services and new product, become more efficient, save time and manage overall business growth.
	ETP has received letters of support from District Council 16/Local Union 294 International Union of Painters and Allied Trades and District Council 36 Local 636 Glaziers, Architectural Metal & Glassworkers Union for Production Staff.

PROPOSED TRAINING PROJECT DETAILS

Training Infrastructure and Administrative Plan	GGI has designated the Director of Finance to oversee training and administration including managing and scheduling the training delivery and documentation. GGI has also retained Training Funding Source (TFS), to assist with administrative processes for enrollment, data tracking and invoicing.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	Although GGI is a repeat contractor, a substantial contribution does not apply because the contractor has not earned $250,000 or more within the previous five years.

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, Computer and Continuous Improvement Skills. OSHA 10/30 will be provided to Production and Distribution Staff.	

4. Additional Company or Training Project Details

Retrainee-Job Creation

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

With the success of its prior ETP contracts, GGI has grown from a small business to a large employer and from 74 to 157 employees in California. To support business growth, GGI is expanding business capacity by adding newly hired employees. The Company has committed to hiring 3 new Production Staff at its Los Angeles location over the next two years.

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

PROPOSED TRAINING PROJECT DETAILS

4.2 Subcontractor Summary

GGI has retained the services of the following Subcontractor.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Training Funding Source	Seal Beach	$ 3,900.00
Administrative	Training Funding Source	Seal Beach	13.00% of payment earned
Training	To Be Determined		

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
ET16-0190	Los Angeles, Fresno, San Bernardino	10/05/15 - 10/04/17	$94,770	$74,286	78%
ET14-0143	Los Angeles, Fresno, San Bernardino	08/26/13 - 08/25/15	$49,140	$49,140	100%

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	Marketing/Sales
	Accounting/Auditing
	Coaching/Communication
	Customer Relations
	Inventory Control
	Leadership
	Time Management
	Goal Setting
	Product Knowledge
	Project Management
	Writing Reports
Commercial Skills (Standard)	Blueprint Reading
	Equipment Operations/Maintenance
	Green Building techniques
	Inventory Control-Cycle Counting
	Leadership Energy Environmental Design
	OSHA 10/30
	Quality Control
	Construction Techniques
	Glass Fabrication
	Inspection Technique
	Job Site Procedures
	Warehouse procedures
Computer Skills (Standard)	AboutTime
	Computer-Aided Design
	Domo
	E-Mail Marketing Tools
	SQL Server
	Adobe
	Crystal Reports
	ERP/MRP Financial Accounting
	Microsoft Office Applications (Intermediate/Advanced)
	Timberline
Continuous Improvement Skills	Change Management
	ISO
	Hazard Analysis & Critical Control Points
	Performance/Process/Quality Improvement

DISTRICT COUNCIL 16/LOCAL UNION 294
INTERNATIONAL UNION OF PAINTERS AND ALLIED TRADES

Jeff Roberts
Regional Director
Business Representative
559-779-8988
Email: jeff@dc16.us

Organizer
Frank Salinas

Administrative Assistant
Tisha Borchardt

PAINTERS

DRYWALL FINISHERS

GLAZIERS

FLOOR COVERING

DC 16

4650 E. Weathermaker Ave.
Fresno, CA 93703
Phone: 559-255-2113
Fax: 559-255-3806
Email: tish@dc16.us

December 19, 2017

The Employment Training Panel
1100 J Street
Fourth Floor
Sacramento, CA 95814

RE: Union Support for ETP Funding

To whom it may concern,
This letter is to confirm support for Giroux Glass in their proposed training being submitted to the Employment Training Panel. Should you have any questions please feel free to contact me.

Regards,

Jeffery B Roberts
Regional Director
San Joaquin Valley and
Southern Central Coast
DC16/LU294/IUPAT

Painters & Allied Trades

District Council 36   *Local 636*

Grant Mitchell
Business Manager

*Glaziers, Architectural Metal
& Glassworkers Union*

December 21, 2017

Employment Training Panel
1100 J Street, Fourth Floor
Sacramento, CA 95814

Re: Union Support for ETP Funding

To whom it may concern,

This letter is to confirm support by Glazier's Local Union 636 for the proposed training to be submitted to the Employment Training Panel by Giroux Glass.

Sincerely,

Mark Bartlett

Mark Bartlett
Business Representative
District Council 636
Local Union 636

TRAINING PROPOSAL FOR

Home Health Care Management, Inc.
18-0639

Panel Meeting Date:	January 24, 2018
Regional Office:	Sacramento Regional Office
Analyst Name:	Karen Smiley
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:		$ 99,450.00	
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$ 99,450.00	N/A	$ 0.00	$ 150,000.00

APPLICANT PROFILE

Company Summary	Home Health Care Management, Inc. (Home Health) provides in-home health care services to the elderly and infirmed. The Company also provides therapy services that increase quality of life for its patients.

Industry Sector(s)	Healthcare
Priority Industry	Yes
No. Employees (Applicant)	**State:** 85 **US:** 85 **World Wide:** 85
Turnover Rate (Applicant)	7%
Repeat Contractor	No
High Unemployment Area	No
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Home Health will be upgrading the skills of its workforce to keep pace with industry regulatory requirements and Medicare/Medicaid operating 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	Retrainee	85	$ 26.00	45	$ 1,170	8 - 60

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 1979, and headquartered in Chico, Home Health provides in-home health care services that specialize in improving the quality of life for adults and those living with disabilities in Northern California. The Company provides health care, therapy, and wellness services. Services include Skilled Nursing and Rehabilitation, Home Care, HIV/Aids Management Services, and Transitional Care. The Company also provides health and safety programs for the communities they serve. These events provide the community with information on healthy lifestyle choices and safety tips. Training will take place at the Company's two facilities in Butte and Shasta counties.

This will be Home Health's first ETP Agreement.

2. Current Training Project Details

Purpose of Training	Home Health has designed an extensive training program focusing on Medical Skills, Medicaid/Medicare regulations and its new software system, Clinical Services System Management. Medical Skills will be offered to Allied Health Care Workers to ensure trainees have the necessary skills to provide top level health services and increase the quality of life for patients. The training program will cover medical equipment operation, physical therapy education, and in-home patient care.
	Standards and regulations set by the Centers for Medicare and Medicaid Services Quality Strategies (CMS) have changed over the past several years due to the implementation of the Affordable Care Act in the skilled nursing and home health industries. Changes such as how patient progress is reported, how treatment plans are documented, and how to properly assess levels of patient acuity have new requirements which all Allied Health Care workers must receive training in to ensure Home Health meets CMS standards.
	In addition to Medical Skills training, Home Health launched a new software program, Clinical Services System Management, in October of 2017 that will be utilized by all staff. Clinical Services System Management was designed to support the changes in CMS regulations. Staff will receive extensive training to ensure proficiency in the new software.

PROPOSED TRAINING PROJECT DETAILS

Training Infrastructure and Administrative Plan	Home Health has designated their Human Resources Manager and an Administrative Assistant to plan, schedule, and implement the training plan across both participating locations. Each location also has a designated contact person who will implement the Company's training plan and collect training rosters. The Company has delivered similar trainings and their training plan is ready to be implemented. The Company also has administrative processes in place to ensure uniform implementation and successful completion of training. In addition, Home Health has retained the services of National Training Systems, Inc., a 3rd Party Administrator, to assist with all administrative requirements of the 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	
All occupations (Attachment 1) will receive training in Computer Skills and Continuous Improvement. Licensed Vocational Nurses, Registered Nurses, Social Workers, and Therapists will receive training in Preceptor and Didactic Medical Skills.	

4. Additional Company or Training Project Details

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, the Company's designation as a Priority Industry allows Home Health to use the ETP Modified Statewide Average Wage of $22.77.

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	National Training Systems, Inc.	Ladera Ranch	$9,500
Administrative	National Training Systems, Inc.	Ladera Ranch	Not to exceed 10% 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

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

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	**Planned Course Offerings**
Computer Skills (Standard)	Clinical Services System Management
	Electronic Medical Records Application Skills
	Excel (Intermediate and Advanced)
	NetSmart
	OASIS
	PowerPoint (Intermediate and Advanced)
	Word (Intermediate and Advanced)
Continuous Improvement Skills	Case Management
	Communication Skills
	Company Processes and Procedures
	Coordination of Care
	Customer Service
	Documentation Skills
	National Patient Safety Goals
	Problem Solving
	Quality Assessment and Improvement
	Team Building
Medical Skills (didactic)	Activities of Daily Living
	Advanced Cardiac Life Support (ACLS)
	Advanced Directives
	Annual Skills Update
	Arterial Blood Gas (ABG) Interpretation
	Assessing Cardiac Changes
	Assessing Respiratory Function
	Basic Life Support (BLS)
	Behavior Management
	Body Mechanics
	Cardiac Conditions
	Care of the Pleurx Patient
	Central Venous Access Devices
	Clinical Orientation
	Dementia Care
	Depression
	Diabetic Management
	Disease Management
	Elder Abuse
	Electrolyte Imbalance
	End of Life Care
	Enteral Feeding Tube Management

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

Equipment Skills
Functional Mobility & Ambulation
Gastrointestinal Assessment & Management
Grief and Bereavement
Handling of Death in a home
Home Care
Hospice Skills
ICD-10 Coding
Incontinence Management (Colostomy & Catheter)
Infection Control
Influenza Vaccination
Intravenous (IV) Therapy
Medical Social Worker Skills
Medical Waste Management
Medicare Compliance Updates
Medication Administration & Management
Neurological Conditions
Orthopedic Conditions
Pain Management (Acute & Chronic)
Palliative Care
Patient Assessment & Care
Patient Fall Prevention
Patient Transfer Techniques
Physical Therapy Skills
Point-of-Care Laboratory Testing
Pressure Ulcers
Psychological and Spiritual issues to death
Rehabilitation Skills
Respiratory Care
Speech Therapy Skills
Supplies, Medical gasses and drugs
Tracheotomy Care
Urinary Management (Foley Catheter, Input/Output)
Wound Management
Wound Vac Therapy

Delivery Method /Level	*Productive Laboratory*
Training Type (Level)	**Planned Course Offerings**
Medical Skills (preceptor)	Body Mechanics
	Dementia Care
	Diabetic Management

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

	Enteral Feeding Tube Management
	Equipment Skills
	Functional Mobility & Ambulation
	Infection Control
	Intravenous (IV) Therapy
	Medication Administration & Management
	Neurological Conditions
	Occupational Therapy Skills
	Orthopedic Conditions
	Patient Assessment & Care
	Patient Assessment And Care
	Physical Therapy Skills
	Rehabilitation Skills
	Speech Therapy Skills
	Wound Care

PL Justification and Details			
Explain the need for productive laboratory (PL) training	Preceptor-led clinical training will be provided to RNs, LVNs, Therapists, Social Workers and Transition Team members. The combination of didactic and clinical training is the accepted best practice for healthcare training and education. The trainee works the same shift as the Instructor throughout clinical training, ensuring assessment requirements are met and documented via a checklist. At the end of each session, the outcome is discussed.		
Describe the Equipment/Processes to be used in delivering the PL training	Medical Equipment such as ventilators, IV's, etc.		
Describe Trainer Qualifications	Preceptors possess expertise and ability to transfer knowledge, attitudes and skills.		
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

Power Factor Electric, Incorporated

18-0671

Panel Meeting Date:	January 24, 2018
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: $194,472.00			
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$194,472.00	N/A	$0.00	$200,000.00

APPLICANT PROFILE

Company Summary	Power Factor Electric, Incorporated (PFE) is an electrical contractor that provides services such as electrical system designs, build-outs, and installation to commercial and residential construction projects.

Industry Sector(s)	Construction
Priority Industry	Yes
No. Employees (Applicant)	**State:** 118 **US:** 118 **World Wide:** 118
Turnover Rate (Applicant)	1.50 %
Repeat Contractor	No
High Unemployment Area	No
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Training will focus on electrical construction trade skills, updates to building codes, and the installation and repair of electrical systems.

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	73	$1,314	8 - 200
2	Job Creation – Retrainee Initiative Program, Retrainee	27	$20.00	73	$1,460	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1996 and headquartered in Rocklin, PFE provides services such as electrical system designs, build-outs, and installation of electrical sysytems throughout commercial and residential construction projects. PFE serves large residential home builders, multi-family home builders, and commercial builders. The Company has one location in Rocklin that will participate in training.

This will be PFE's first ETP Agreement.

2. Current Training Project Details

Purpose of Training	PFE's main focus of training will be on electrical system installation trade skills and changes to the California's building code. Staff will also focus training on new technologies that have entered the industry, and new demands from customers. The industry's new technologies include upgrades to home and commercial alarm systems and new Smart Home systems. Trainees will learn how to install, troubleshoot, and repair all types of electrical and alarm systems. Training will help keep PFE competitive and at the forefront of its industry. The Company has also established a twelve-step career pathway to support employee development. The Company has developed training requirements and benchmarks which employees are required to meet in order to progress and promote within the organization. The pathway will allow new and current staff to improve interpersonal skills, project management and commercial trade skills to increase customer satisfaction and efficiencies. Meeting certain levels of the twelve-step career pathway program allows for step pay increases.
Training Infrastructure and Administrative Plan	Company leadership and Managers are all onboard and prepared to implement PFE's training plan upon contract approval. PFE has assigned 11 Lead Foremen to coordinate all training for their staff and to work with the training department to organize all training. In-house experts will provide training in Class/lab and Productive Lab. PFE has also assigned two administrative personnel and three support staff members to oversee all administrative duties. In addition, the Company has retained Propel Consulting Group 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

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 and Computer Skills.	

Delivery Method/Level	Productive Laboratory
Summary	
Foremen, Electrician and Low Voltage Installer occupations will receive PL training in Commercial Skills.	

4. Additional Company or Training Project Details

Retrainee – Job Creation

The Panel offers incentives to companies that hire new employees including a higher Reimbursement Rate. PFE will hire 27 net-new employees (Group Number 2). Occupations will include Administrative Staff, Driver, Electricians, Foremen and Low Voltage Installers

PFE has experienced a significant growth and is currently understaffed. The California construction industry is growing at considerable rates, and the Company has declined work due to the lack of staff. PFE will need to recruit and train new employees to support the increase in business. In addition to new construction products, the Company has experienced an increase in business due to new products being offered such as smart home systems.

Trainees must be hired into net new positions within the three-month period prior to Panel approval or during the term of the Agreement.

4.1 Program Waivers

N/A

PROPOSED TRAINING PROJECT DETAILS

4.2 Subcontractor Summary

PFE has retained the services of the following Subcontractor.

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	13% of payment earned
Training	To be Determined	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	*Classroom/Simulated Laboratory*
Training Type (Level)	**Planned Course Offerings**
Business Skills	Communication Skills
	Customer Service
	Leadership
	Motivation
	Problem Solving and Decision Making
	Project Management
	Team Building
Commercial Skills (Standard)	Alarm Systems
	Box/Drill House
	Breaker and Hot Check
	Electrical Hazards
	Electrical Make-up Work
	Hang Fixtures
	House Layout
	Install QFL/Pre-Lath
	Material Handling
	NEC Code Updates
	OSHA 10
	OSHA 30
	Prefabricated Panels
	Properly Using Tools
	Pull Wire
	Ring Out
	Set Panels
	Setting Risers/Islands
	Switch and Plug
	Title 24 Update
	Trenching and Excavation
	Troubleshooting
	Understanding Blue Prints
	Vehicle Inspection
Computer Skills (Standard)	Active Takeoff
	Buzzsaw
	DaPulse
	DRH CSME Software
	DRH VE Software
	Dropbox
	Intermediate/Advanced MS Office
	Quickbooks

Attachment 2 - Training Delivery and Curriculum Listing

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

	SupplyPro
	TNHC Vendorlink
	Trello
	TriPointe CPSUSA

Delivery Method /Level	Productive Laboratory
Training Type (Level)	**Planned Course Offerings**
Commercial Skills	Alarm Systems
	Box/Drill House
	Breaker and Hot Check
	Electrical Hazards
	Electrical Make-Up Work
	Hang Fixtures
	House Layout
	Install QFL/Pre-Lath
	Material Handling
	NEC Code Updates
	Prefabricated Panels
	Properly Using Tools
	Pull Wire
	Ring Out
	Set Panels
	Setting Risers/Islands
	Switch and Plug
	Trenching and Excavation
	Troubleshooting
	Understanding Blue Prints
	Vehicle Inspection

PL Justification and Details			
Explain the need for productive laboratory (PL) training	Due to the nature of its 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. Occupations include Foremen, Electricians, Low-Voltage Installers. The trainer-to-trainee ratio will not exceed 1:3. Training is capped at 40 hours per-trainee.		
Describe the Equipment/Processes to be used in delivering the PL training	Training will utilize all equipment necessary to prepare for electrical work, as well as the actual installation and testing of the wiring. The instructor will work with trainees on understanding the blueprint/house layout, steps on proceeding with the work as planned, demonstrate to the employee how to perform tasks, then allow trainee to perform the tasks independently. Staff will be trained on proper installation of electrical systems including alarm systems, setting risers/islands and set panels.		
Describe Trainer Qualifications	Trainers are certified in their area of expertise and have completed PFE's internal training programs. Trainers have many years of on-the-job experience, as well as years of training new and existing staff. The main PL trainer is the PEI Field Superintendent responsible for all field personnel and projects. He will be supported by the eleven foremen who will also provide field 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	3

Attachment 2 - Training Delivery and Curriculum Listing

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

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

Retrainee – Job Creation

TRAINING PROPOSAL FOR

Pyramid San Gabriel Management L.P. dba Sheraton San Gabriel

18-0557

Panel Meeting Date:	01/24/2018
Regional Office:	North Hollywood Regional Office
Analyst Name:	Monique Webb
Type of Proposal:	Single Employer
Funding Source:	SET

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: $200,400.00			
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$200,400.00	N/A	$0.00	$240,000.00

APPLICANT PROFILE

Company Summary	Pyramid San Gabriel Management L.P. dba Sheraton San Gabriel (Pyramid SG) is a new hotel recently opened January 2018.

Industry Sector(s)	Services (Other)
Priority Industry	No
No. Employees (Applicant)	**State:** 1,272　　**US:** 5,370　　**World Wide:** 5,370
Turnover Rate (Applicant)	0.00 %
Repeat Contractor	No
High Unemployment Area	No
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Training for newly hired workers will include skills needed in the hotel industry such as customer service and communication 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	167	$20.00	60	$1,200	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Headquartered in San Gabriel, Pyramid SG is operated by the Pyramid Hotel Group, a hotel management company founded in 1999, and based in Boston, MA. Pyramid SG will be one of the center cornerstones for the rejuvenation of downtown San Gabriel located in close proximity to downtown Los Angeles and the greater Los Angeles area. It is estimated that 64% of the hotels target customers will visit from Pacific Rim countries such as China, Vietnam and Japan, as well as Western Canada, Washington and Oregon. This will be Pyramid SG's first ETP Agreement.

2. Current Training Project Details

Purpose of Training	To maintain a high level of customer service, staff will be trained must in hospitality and communication skills, business processes, and computer application skills. In addition, training will include receive new technology in maintenance, kitchen appliances and management skills.
	As of December 2017, training for Pyramid SG staff has begun and will ensue as the Company continues to hire new workers throughout the duration of the Agreement. All employees will receive training to learn new skills required in the service/hospitality industry. Training provided will be specific to the employee's job occupation to ensure skill sets meet Sheraton hotel standards.
	To meet customer expectations and uphold the Sheraton brand, training will focus on Business, Management and Computer Skills to increase leadership, coaching and problem solving skills. Kitchen staff will learn new skills to use kitchen appliances as well as prepare new menu items precisely; and House Keeping Staff will receive training to ensure cleanliness of Pyramid SG hotel rooms. Staff will learn how to use chemicals and materials to clean rooms, hallways, conference rooms and ballrooms.
	Computer Skills training will also be provided to employees assigned to work the front desk. Training will enable workers with the skills to use the company's new Private Brand Exchange and Point of Sale systems to complete responsibilities required of the front desk.
Training Infrastructure and Administrative Plan	Department Managers will be responsible for all training delivered within their departments. Human Resources staff will then work alongside the third part administrator, National Training Company North, to enroll employees, track training hours, and complete data entry. Training will be delivered by in-house subject matter experts.
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	
Trainees will receive Business, Computer, Continuous Improvement, and Management Skills training delivered through Class/Lab as shown in detail in Attachment 2.	

4. Additional Company or Training Project Details

Retrainee – Job Creation

Pyramid San Gabriel has committed to hiring 167 new employees. Although 167 trainees are included in this proposal, the Company will exceed this number to manage growing business operations for this new hotel. Trainees will receive approximately 60 to 100 hours of training to ensure they are able to execute daily job duties efficiently. 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

Pyramid SG has retained the services of the following Subcontractor.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	National Training Company North	Middletown	$10,000.00
Administrative	National Training Company North	Middletown	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	Business Processes
	Communication & Amp; Impersonal Skills
	Dealing With Difficult People
	Guest Service Skills
	Hospitality & Communication Skills
	Identifying/Meeting Guest Needs
	Negotiating Skills
	Operating Procedures
	Putting the Guest First
	Resolving Guest Complaints
	Service Values
Computer Skills (Standard)	Accounting Skills
	Computer Application Skills
	Customer Information Systems
	Internal Customer Applications
	MS Office (Intermediate and Advanced)
	Point of Sale Applications
	Procurement Software
	Reservation Systems
	Sales Reports & Amp; Scheduling Software
	Smartphone Technology and Application Skills
	Tablet Technology and Application Skills
Continuous Improvement Skills	Critical Thinking Skills
	Kaizan Events
	Measuring for Success
	Problem Solving and Resolution
	Standard Work Procedures
	Team Building Skills
Management Skills	Accountability & Taking Responsibility
	Change Management
	Coaching and Mentoring
	Communication
	Conflict Resolution
	Empowerment
	Motivation & Amp; Attitude Improvement
	Professionalism
	Relationship Building
	Supervisory Skills
	Teamwork

TRAINING PROPOSAL FOR

RDC-S111, Inc.

17-0932

Panel Meeting Date:	01/24/2018
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:		$ 117,432.00	
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$ 117,432.00	N/A	$ 0.00	$ 280,173.20

APPLICANT PROFILE

Company Summary	RDC-S111, Inc. is an architectural firm specializing in the design and architecture of commercial buildings such as retail stores, restaurants, office and workplace buildings in the entertainment and hospitality industries. The Company provides a full-service architecture package from conceptual design, entitlement, site planning to all stages of construction documentation and administration for projects on many different scales, ranging from small store planning to large master plans. Some of its specialty services include, Architecture Planning Interiors Sustainability, Green Building Certifications and Community Initiatives Expertise, Retail Centers and Stores and Entertainment Hospitality Offices.
Industry Sector(s)	Professional, Scientific, and Technical
Priority Industry	Yes

No. Employees (Applicant)	State: 165	US: 183	World Wide: 183
Turnover Rate (Applicant)	10.00 %		
Repeat Contractor	No		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	RDC-S111 is requesting ETP funding to train its employees in Business, Computer and Commercials Skills to meet the current changes and requirements for designing buildings and architectural and building codes upgraded every 3 years. The Company will also train its employees on several software platforms used by architects and designers in the design and development process.
	Given increased number of projects and clients in the past year and plans to create additional positions to respond to this expansion of services and market demand, RDC-S111 plans to hire 5 support staff and 10 technical staff (5 of these positions have been recently fulfilled). All "newly hired" trainees will receive training within the term of this Agreement.

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	108	$18.00	53	$954	8 - 200
2	Job Creation – Retrainee Initiative Program, Retrainee	15	$20.00	48	$960	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

RDC-S111, Inc., seeks ETP funding for retraining. Founded in 1979, the Company is headquartered in Long Beach. RDC-S111 is a full-service architecture practice with experience in conceptual design, entitlement, site planning, and all stages of construction documentation and administration. The Company's expertise encompasses various project scales, from small store planning to large master plans, focusing on design of retail centers, stores, office and workplace buildings in the entertainment and hospitality 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	In a time when demographics, transportation, technology, and social behaviors are shifting consumer retail needs, RDC-S111, Inc. must venture into new concepts of design and architecture that satisfy the needs of the customers. RDC-S111, Inc. needs to create designs for their retail center customers to entice customers back to traditional brick and mortar store shopping as opposed to online shopping. RDC-S111 needs to train its architects and design team to design buildings that meet this market need. In addition, significant training is needed on new advanced design software used in the design and development process such as Revit, Rhino, Fuzor, Ajera and Newforma.
	RDC-S111, Inc.'s clientele has expanded, and building codes are changing worldwide. These codes dictate requirements for the industry as well as specific requirements for specialty buildings, including retail, entertainment and office buildings. Under new building codes, RDC-S111, Inc. is required to incorporate code requirements into the design process. Company employees must be knowledgeable and trained on required building code updates to provide quality services and design buildings that meet industry standards.
Training Infrastructure and Administrative Plan	RDC-S111 has retained the services of Welsh Advisors to administer the ETP project. RDC-S111, Inc.'s Chief Financial Officer and Human Resources staff will oversee all other aspects including coordinating training with different departments, scheduling and ensuring training completion is documented for ETP reimbursement. Training will be delivered by a combination of in-house staff and vendors.

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	
BUSINESS SKILLS – This training will be provided to administrative staff and lead architects. Training will provide employees the skills necessary to manage various phases of the projects and tools specific to their job function. Trainees will learn efficient ways and processes of time and job management and customer relation which will maximize production and efficiency. **COMMERCIAL SKILLS** – This training will be provided to administrative staff and architects. The technical training will provide employees the vital knowledge and tools to design functional and cost-effective facilities that provide solutions accessible to all types of residents and end users particularly the elderly population and those with limitations in mobility which will enable RDC – S111 Inc. become compliant and responsive to the industry it serves. **COMPUTER SKILLS** - Training in computer skills will provide employees, particularly the architects, with the ability to use new and updated software tools essential in the design process. Employees will receive training in Revit, Fuzor, Ajera, Rhino and Newforms.	

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	Welsh Advisors, Inc.	Anaheim	$5,040.72
Administrative	Welsh Advisors, Inc.	Anaheim	13% of funds earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	**Planned Course Offerings**
Business Skills	Leadership Skills
	Negotiation Skills
	Professional Writing Skills
	Project Management
Commercial Skills (Standard)	CA Code of Regulations, Title 5 (school Facility)
	Product Knowlege
	Product, Engineering and Design Practices and Proc
Computer Skills (Standard)	Ajera
	Fuzor
	Lumion
	Lynda.com
	Microsoft Office - Intermediate and Advanced
	Newforma
	Revit
	Rhino
	SketchUp

TRAINING PROPOSAL FOR

ServiceTitan, Inc.

17-0776

Panel Meeting Date:	01/24/2018
Regional Office:	North Hollywood Regional Office
Analyst Name:	Lan Vuong
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:		$ 209,790.00	
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$ 209,790.00	N/A	$ 0.00	$ 635,197.00

APPLICANT PROFILE

Company Summary	ServiceTitan, Inc. (ServiceTitan) (www.servicetitan.com) designs and develops cloud-based software platform for home service contractors and home service companies.

Industry Sector(s)	Professional, Scientific, and Technical		
Priority Industry	Yes		
No. Employees (Applicant)	**State:** 306	**US:** 324	**World Wide:** 324
Turnover Rate (Applicant)	15.00 %		
Repeat Contractor	No		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Training will focus on products, services, procedures and business operations to increase sales, improve customer service and keep up with technological advances.

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	259	$ 18.00	45	$ 810	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 2012 and headquartered in Glendale, ServiceTitan designs and develops end-to-end solutions (installation, integration, set-up and support) including service history, equipment, inventory, orders, appointments, estimates and customer reports, for cloud-based software platforms that streamline operations and improve customer service. The solutions include client relationship management, intelligent dispatch, comprehensive reporting, marketing management tools, mobile connectivity, and Quickbooks integration.

ServiceTitan brings a fully operational modern Software-as-a-Service infrastructure to an industry traditionally underserved by software (home service contractors and home service companies). Major customers include plumbing companies, HVAC and electrical companies, Mr. Rooter, Mr. Electric, Aire Serv, NexStar Network™, QSC, Service Nation Alliance and Service Roundtable. Products and services are provided to customers throughout the U.S and Canada.

2. Current Training Project Details

Purpose of Training	ServiceTitan is continually striving to meet customers' expectations and demands to deliver the best software platform solutions and services. To do this, the Company must improve support for products and services and upgrade workforce skills. Trainees will receive customer service skills necessary to better understand customer requirements, support sophisticated products and services, and provide more efficient services. The Company must train employees to keep up with technology changes. Training will focus on core competencies in the following areas: company values; goal setting; communication and collaboration; effective decision making; organization and planning; teamwork; contribution to other's success; demonstration of subject matter expertise; and management and leadership.
Training Infrastructure and Administrative Plan	ServiceTitan has created a Learning and Development team consisting of two Learning and Development Specialists, a Manager, and an Employee Learning and Development staff member. This team will manage training and administration, coordinating with department management staff. This team will work with the Financial Operations team to coordinate training schedules, collect rosters, track data, and invoice. Training will take place at the Glendale facility. Training will be delivered by in-house subject matter experts and outside vendors to be identified during the contract term.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A

PROPOSED TRAINING PROJECT DETAILS

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 job specific training in Business and Computer Skills topics listed under Attachment 2.	

4. Additional Company or Training Project Details

N/A

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

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	Coaching
	Communication Skills
	Conflict Management
	Customer Service
	Data Driven Decision Making
	Delivering Feedback
	Goal Setting
	Interpersonal Skills
	Management & Leadership Development
	Managing Change
	Meeting Management
	Motivation
	Presentation Skills
	Product Knowledge
	Project Management
	Public Speaking
	Risk Management
	Sales Skills
	Setting Expectations
	Six Sigma
	Strategic Thinking
	Supportive/Teamwork
	Technical Skills
	Time Management
	Working Across Generations
Computer Skills (Standard)	C++
	Excel (Intermediate/Advanced)
	Google Suite
	Product Knowledge
	Programming Languages
	Salesforce
	SQL

TRAINING PROPOSAL FOR

Trench Plate Rental Co.

18-0565

Panel Meeting Date:	01/24/2018
Regional Office:	North Hollywood Regional Office
Analyst Name:	Margarita Paccerelli
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:		**$ 193,572.00**	
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$ 193,572.00	N/A	$ 0.00	$ 322,000.00

APPLICANT PROFILE

Company Summary	Trench Plate Rental Co. (TPR) provides quality trench protection equipment and solutions to the construction industry.

Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	**State:** 289	**US:** 397	**World Wide:** 397
Turnover Rate (Applicant)	11.00 %		
Repeat Contractor	Yes		
High Unemployment Area	Yes		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Trainees will learn to navigate the new ERP system which will provide the Company cross-functional integration and help it remain competitive in the 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	283	$ 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 1979 and headquartered in Downey, TPR seeks ETP funding for retraining. TPR provides quality trench protection equipment and solutions to the construction industry. Its equipment is manufactured by its wholly-owned subsidiary, Westar Manufacturing, dba Quik-Shor.

In addition, TPR provides traffic safety management for construction sites such as cones, vests, barricades, and detour signs through its Traffic Solutions division. TPR also offers consulting, and equipment set-up and removal. TPR's products and services have been used on major projects including the Pacific Gas & Electric disaster clean up, Helex Electric's Long Beach Pier project, and ARB Inc.'s 70 mile pipeline in Northern California.

TPR's 13 locations, including Quik-Shor, will participate in training.

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	Facing strong competition, the Company evaluated its systems and operations. TPR invested $1M in a new ERP system and laptops to provide crucial metrics and cross functional integration, helping the Company remain competative.
	The proposed training will focus on the new system, Infor Software, which affects every aspect of business from accounting, rentals, inventory, manufacturing, and sales. The system shares information between different facilities and departments to streamline business. The new system is customized for the Company's operational demands, performing the functions of six current TPR systems, replacing Great Plains, Sales Force, FAS (Fixed Asset Software), document imaging and more. By the end of 2018, field workers delivering and picking up equipment will need to be trained on a new paperless inventory and customer tracking system.
	This change will result in greater efficiencies, an enhanced customer experience, client retention, and new sales growth.
	This will be TPR's second ETP project, its first within the last five years.
Training Infrastructure and Administrative Plan	TPR's Chief Financial Officer and Controller will oversee training and internal administration of the project. There will be six staff members responsible for scheduling the training in various locations. An administrative consultant has also been retained to

	assist with project administration such as enrollment, tracking of training hours, and to ensure that all training records meet ETP compliance. The majority of the training will be provided by in-house subject matter experts. Some initial training in Computer Skills will be provided by the software vendor to a few key personnel, who in turn, will train trainees.
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 Continuous improvement, Business, and Computer Skills. Trainees involved in manufacturing will receive training in Manufacturing Skills.	

Delivery Method/Level	**E-Learning - Instructor Led/Distance Learning**
Summary	
Trainees in some locations will participate in the Computer Skills (Infor) training via a live interactive webcast with an instructor.	

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 Panel Proposal.

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	RSM US LLP	San Diego	$5,000.00
Administrative	RSM US LLP	San Diego	13% of funds earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

There have been no ETP projects completed within the last five 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.

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	**Planned Course Offerings**
Business Skills	Accounting Skills
	Business Presentation Skills
	Communication Skills
	Customer Service Skills
	Marketing/ Sales Strategies
	Product Knowledge
	Technical Product Specification
Computer Skills (Standard)	Infor Software Training
	Internal Computer Systems
	MS Office Advanced & Intermediate
	Production Management and Reporting Software
	Server Support
	Software Maintenance
	Statisical Analysis Software
Continuous Improvement Skills	Crane Driver Training
	Cross Training Primary/ Secondary Skills
	Potential Problem/ Opportunity Analysis
	Product Maintenance
	Project Management
	Standard & Operating Procedure
Manufacturing Skills (ME) (Standard)	Assembly Procedure
	Equipment Operation & Maintenance
	Forklift Operation

Delivery Method /Level	E-Learning – Instructor Led/Distance Learning
Training Type (Level)	**Planned Course Offerings**
Computer Skills (Standard)	Infor Software Training

TRAINING PROPOSAL FOR

WorldWind Services, LLC
17-0669

Panel Meeting Date:	01/26/2018
Regional Office:	North Hollywood Regional Office
Analyst Name:	Marisol Niquet
Type of Proposal:	Single Employer, 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:		**$ 65,000.00**	
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$ 65,000.00	N/A	$ 0.00	$ 219,680.72

APPLICANT PROFILE

Company Summary	WorldWind Services, LLC (WWS) is an independent wind and solar solutions provider.

Industry Sector(s)	Construction
Priority Industry	Yes
No. Employees (Applicant)	**State:** 100 **US:** 176 **World Wide:** 176
Turnover Rate (Applicant)	11.70 %
Repeat Contractor	No
High Unemployment Area	Yes
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Training will help the Company design, develop and implement customized, cost-effective solar solutions.

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	100	$ 26.00	25	$ 650	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 2007 and headquartered in Tehachapi, WWS is an independent wind and solar solutions provider. The Company also provides construction support, operations and maintenance (O&M) support, and specialty services including land management (including replanting and rebuilding of disturbed lands), tower wiring, quality assurance and quality control (QA/QC), commissioning, maintenance, design modifications, retrofits, and large corrective and full wrap O&M services. Customers consist of Engineering Procurement and Construction (EPC) companies, Original Equipment Manufacturers (OEM), Building Owners, Developers and Asset Managers.

2. Current Training Project Details

Purpose of Training	The renewable energy industry, including technology used to generate power and the systems used to monitor and maintain them, has evolved. The size and complexity of projects has increased. To keep up with these changes, WWS has increased its service capabilities. Before, the Company was primarily an electrical construction service firm. However, WWS has evolved into a full service company that offers related services. The Company will need to train employees on these new services. Additionally, WWS recently added a full suite of Safety Management System trainings which consist of electrical and mechanical maintenance, trouble-shooting, tools, and approved maintenance procedures. The technical capabilities of operators and technicians are key factors in stabilizing costs and attracting clients. Thus, the Company created a training plan to improve skills of all employees. The Company plans to deliver 40 hours of training for each trainee. Training will be delivered by a combination of in-house subject-matter experts and vendors to be identified during the contract term.
Training Infrastructure and Administrative Plan	WWS spends an estimated $358,000 annually on training at its California facility. The Company currently provides on-the-job training related to specific job functions. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law. The Company's President and Special Project Manager will oversee training delivery, scheduling, and tracking and will also ensure that training administration and documentation adhere to ETP requirements.
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	
All occupations will receive training in Commercial Skills as shown in detail in Attachment 2.	

Delivery Method/Level	E-Learning - Computer Based Training (CBT)
Summary	
All occupations will receive training in Commercial Skills as shown in detail in Attachment 2.	

4. Additional Company or Training Project Details

N/A

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 provide additional 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**
Commercial Skills (Standard)	First Aid/CPR
	GE ESS
	GE LOTO
	HTR Solar
	Solar Ware O&M Training
	Wind Turbine Tower and Rescue
	WWS Maintenance

Delivery Method /Level	E-Learning – Computer Based Training (CBT)	
Training Type (Level)	**Planned Course Offerings**	**Standard Hours**
Commercial Skills (Safety)	OSHA 10 General Industries	10.00
Commercial Skills (Standard)	NFPA 70 E	8.00

STATE OF CALIFORNIA
ETP
EMPLOYMENT
TRAINING PANEL

Retrainee – Job Creation

Training Proposal for:

Southern California Permanente Medical Group

Agreement Number: ET18-0163

Panel Meeting of: January 24, 2018

ETP Regional Office: North Hollywood   **Analyst:** M. Webb

PROJECT PROFILE

Contract Attributes:	Medical Skills Training Priority Rate Retrainee SET		Industry Sector(s):	Healthcare
				Priority Industry: ☒ Yes ☐ No
Counties Served:	Los Angeles, Orange, Riverside, San Bernardino, San Diego, Kern		Repeat Contractor:	☒ Yes ☐ No
Union(s):	☒ Yes ☐ No United Healthcare Workers West and UFCW Local 770			
Number of Employees in:	CA: 148,356	U.S.: 208,975		Worldwide: 208,975
<u>Turnover Rate</u>:	8%			
<u>Managers/Supervisors</u>: (% of total trainees)	N/A			

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
$749,520		$0	$0		$749,520

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

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 Job Creation Initiative Medical Skills Training Priority Rate SET	Comm'l. Skills, Computer Skills, Cont. Imp., MS-Didacitic	1,041	8-200 Weighted Avg: 36	0	$720	$13.66

Minimum Wage by County: SET/Job Creation: $14.62 per hour in Los Angeles County; $14.58 per hour in Orange County; $14.19 per hour in San Diego County; and $13.66 per hour in Kern, 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

Although health benefits are provided, they are not needed to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Administrative Support Staff		100
Clerical Staff		60
Data Processing and Computer Operations Staff		50
Health Care Analysts		40
Licensed Vocational Nurses		120
Patient Care Aides and Assistants		160
Patient Care Support Staff		155
Registered Nurse		150
Technicians and Technologists I		200
Technicians and Technologists II		6

INTRODUCTION

Founded in 1945, Southern California Permanente Medical Group (Kaiser) (www.kp.org) is a for-profit partnership and professional corporation of physicians responsible for providing and arranging medical care. Kaiser operates under three corporate umbrellas: Kaiser Foundation Health Plans (Nonprofit), Kaiser Foundation Hospitals (Nonprofit), and Kaiser Permanente Medical Groups (For-Profit). The medical groups formed The Permanente Federation to provide governance and policy direction on a national level.   Training proposed in this proposal will be

limited to employees of the Southern California Permanente Medical Group. In California, the medical group generally employs non-hospital personnel in the Kaiser system, with the exception of emergency room personnel, who are employees of Kaiser. The group was previously registered as a Corporation; however, it has now been restructured into a General Partnership.

Kaiser serves members in eight states and the District of Columbia: California, Colorado, Georgia, Hawaii, Maryland, Oregon, Virginia and Washington. The Southern California region currently serves more than 4.4 million members. Care is provided by more than 7,200 physicians at 15 medical centers and 225 medical offices. This will be Kaiser's eleventh ETP Agreement, and the sixth in the last five years.

The Affordable Care Act continues to challenge Kaiser to offer more Californians high quality health care at affordable prices. Unlike some health care groups, Kaiser has chosen not to cut back on its participation in Affordable Care Act coverage, including coverage provided through Covered California. The challenges faced by Kaiser and the training solutions proposed in this proposal are similar to those addressed in prior ETP Agreements. This proposal illustrates the Medical Group's continued efforts to train newly hired staff and improve medical care.

PROJECT DETAILS

Kaiser's membership in the Southern California region continues to increase. In the last year, membership increased from 4,225,000 to 4,395,000. Employment increased by approximately 1,500, including almost 600 new physicians. This increase necessitates training for staff to provide quality patient care for new and existing members.

Kaiser is an integrated health care delivery system that incorporates broad improvements as new methods and technology become available. The medical group has developed the following steps to support training efforts scheduled over the next few years: Strengthen the skills and competencies of clinical employees so they follow evidence-based protocols, eliminate errors and improve care; Improve the skills and abilities of administrative employees to plan and support patient care; and Increase the effectiveness of unit-based teams and the Company's Labor-Management Partnership program.

This training plan includes new initiatives to support behavioral health, community health, care coordination, transition management, and leadership. In behavioral health, Kaiser will implement training in Mental Health First Aid which trains employees to assist and support others facing a mental health crisis until appropriate professional help is available. Primary care physicians, nurses, and aides will receive training to directly treat mental illness. Community health initiatives include new clinics to open in Target stores to increase medical offices in under-served communities. Specialized training will be provided to workers who will staff these clinics and offices to ensure medical care will meet patient care needs.

Training will also focus on care coordination and transition management. Nursing staff will participate in training to improve critical transitions and coordination issues among home providers, outpatient and inpatient systems. All trainees to participate in training under this proposal will be newly hired staff (Job Creation).

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 continue providing quality health services to the growing membership of Kaiser, the medical group must increase its employee population. In addition, the medical group will also staff new clinics located inside Target Stores. Kaiser has committed to hiring 1,041 new employees (Job Number 1). Newly hired Medical and Clerical Staff will receive job specific training to ensure they are familiar with Kaiser procedures (patient and safety), computer software programs, and documentation standards. Medical Staff may receive up to 200 hours of Medical Skills Training and Clerical Staff may receive between 30 to 60 hours depending on their occupation title. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

Training Plan

Training will be delivered by in-house experts via class/lab in the following:

Medical Skills-Didactic: Training will be offered to Health Care Analysts, Licensed Vocational Nurses, Patient Care Aides/Assistants, Registered Nurses and Technicians/Technologists. Staff will receive training in medical care treatment to enhance staff skill set and improve quality of care provided to patients.

Commercial Skills: Training will be offered to all occupations in documentation procedures such as healthcare enrollment and registration, as well as comprehend all steps in transition planning, and business literacy.

Computer Skills: Training will be offered to all occupations in Kaiser computer systems. Training provided will include software updates in Health Connect and electronic medical record keeping.

Continuous Improvement: Training will be offered to all occupations to improve employee skills in case management, communication, service and conflict resolution.

Commitment to Training

Kaiser spends approximately 10 million dollars annually in training in the Southern California region. The medical group will continue to provide on-the-job training, new hire orientation, and management skills training to employees.

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

➢ Training Infrastructure

Kaiser will utilize its existing administration team to be responsible for ETP enrollment, scheduling training, record keeping, and meeting with ETP staff. The Director of Regional Professional Development and Research Ambulatory Services will oversee all project training.

Electronic Recordkeeping

ETP staff has reviewed and approved the medical group's use of an Electronic Recordkeeping System to document training.

Union Support

Union support letters have been provided by the United Healthcare Workers West and UFCW Local 770.

Substantial Contribution

Substantial Contribution does not apply to this project. This proposal is for Job Creation, and therefore, not subject to a substantial contribution.   Note: Statewide, Kaiser will have received ETP funding of approximately $2.3M over the last five years, including projections for ET16-0164. Of this total, $900K was earned for Job Creation, and exempt from substantial contribution.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0255	$599,616	10/30/16-10/29/18	1,747	1,747	1,747

Based on ETP Systems, 33,337 reimbursable hours have been tracked for potential earnings of $599,616 (100% of approved amount). Kaiser has exceeded the Agreement amount in training hours totaling approximately $620k already. As of February 20, 2017, all trainees enrolled and tracked for ETP funding have completed the 90-day retention period. Staff will submit all progress and final payments February 2018.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET16-0164	Multi Counties	10/01/15-09/30/17	$637,092	$637,092 (100%)
ET14-0117*	Multi Counties	08/01/13-07/31/15	$600,000	$600,000 (100%)
ET11-0321*	Multi Counties	06/30/11-06/29/13	$299,880	$299,880 (100%)
ET11-0132	Multi Counties	02/07/11-02/06/13	$249,480	$249,480 (100%)

*ET14-0117 and ET11-0321: Funds were used for Job Creation only. As such, these earnings do not apply toward a Substantial Contribution.

DEVELOPMENT SERVICES

Steve Duscha Advisories in Sacramento assisted with development of this proposal at no cost.

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

N/A

<u>**Exhibit B: Menu Curriculum**</u>

<u>**Class/Lab Hours**</u>

8-200   Trainees may receive any of the following:

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

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

CONTINUOUS IMPROVEMENT
- Consensus Decision-Making
- Preparing for Leadership Roles
- Critical Event Team Training
- Leading Teams
- Labor Management Partnership
- Lmp Performance Academy
- Proactive Office Encounter
- Quality Improvement Programs
- Speaking Up: Fostering an Open and Psychologically Safe Environment
- Unit Based Team – Member
- Budgeting, Staffing and Scheduling
- Case Management/Discharge Planning
- Charge Nurse Training/Frontline Leadership Skills
- Coaching Fundamentals

- Communications Skills
- Conflict Resolution Skills
- Front Office Operations Improvement
- Gathering and Using Data
- Handling Difficult Situations
- Human Resources Management
- Identifying and Resolving Problems
- Organization and Time Management Skills
- Patient and Family Centered Care Skills
- Performance and Quality Improvement and Procedures Skills
- Planning and Designing Work Processes
- Raid Improvement Model
- Reviewing and Evaluating Team Performance
- Root Learning Maps
- Service Excellence
- Team Building Skills

MEDICAL SKILLS - DIDACITC

- ACLS
- Fetal Heart Monitoring
- Advanced Stroke Education
- AED Defibrillator Training
- Aerosol Transmissible Diseases Training
- Alaris Pump Review
- Ambulatory Nursing Orientation
- Ambulatory Care Wound Care Management
- Ambulatory Competencies
- Anesthesia Dept. Orientation Checklist
- Annual Competency Validation
- Audiometric Hearing Screening Training
- Basic Life Support Skill Testing
- Blood & Blood Components
- Blood Pressure Competency
- Blood Borne Pathogen
- Breast Biopsy Procedure
- Call Center Orientation
- Cardiac Catheterization Lab Nursing Orientation
- Cardiac Monitoring - 2014
- Care and Concern
- Care Experience Training
- Care of the Patient after Renal Biopsy
- Care of the Patient with Oncology Diagnosis/History
- Caring for and Protecting Our Elderly Patients and You
- Center of Excellence for Minimally Invasive Gynecology
- Central Venous Access Device
- Chemotherapy Administration
- Chest Radiology Tumor Board
- Chest Tube Drainage and Monitoring Care

- Cleft Palate & Craniofacial Clinic
- Clinical Review
- CNA Nursing Orientation
- Co-Lead Transition Workshop
- Code Blue Simulation
- Community Health Assessment and Treatment
- Comprehensive Workplace Safety System
- Covidien Urology Tray Enhancements
- Delirium
- Dermatopathology Clinical Cases
- Diabetes Management
- Diagnostic Imaging RN Orientation Competency and Skill Validation
- Dietary Aide Orientation Competency
- Dietary Aide Orientation Competency Skills Validation
- Documentation Review
- Ear Lavage Policy
- Echo Cardiology QA
- Education Day Modules
- EKG
- Emergency Area Orientation
- Emergency Medicine Morbidity and Mortality
- Equipment
- ER Tech Orientation Competency
- Essential Of Successful Communication
- Falls Prevention
- Family Centered Care Course - Post Partum
- Fecal Occult Blood
- Fetal Diagnosis And Management Conference
- Flu Competency
- Food And Nutrition Room Service Review
- General Surgery Morbidity and Mortality Conference
- General Tumor Board
- Globally Harmonized System
- Glucometer Training - Staff Validation
- Head and Neck Surgery Tumor Board Meeting
- Health Care Worker Orientation Day 1
- Identifying Acute Change in Patient Status and Activating Critical Response
- Implanted Ports
- Infection Prevention
- Insulin Initiation & Titration
- Intravenous Medication Administration
- Labor & Delivery Scrub Training
- Laboratory Employee Skills/Competency Assessment Orientation
- Laser Safety Training
- Life Safety and General Orientation for MRI and CT
- Lifting and Body Mechanics
- Lipid Management

- LVN Orientation
- MA/LVN HCWO Training Program
- Medical Panel Workflow
- Medical Terminology Book Completion
- Medication Inhalation - Initial
- Mental Health Aid
- Mental Health Assesment and Treatment
- Mental Health Referrals
- Neonatal Resuscitation Program
- Neuroradiology
- New Grad Program
- Nova Glucometer Training Validators Class
- NRP
- Nuclear Med/MRI Tech Competency
- Nurse Advice
- Nursing Assistant Ward Clerk Update
- Nursing Update
- On Call RN Telephone Triage
- Chemotherapy & Biotherapy Provider
- Ophthalmology
- Pain Management
- Patient Safety University
- Pediatric Advanced Life Support Provider Program
- Pediatric Assessment, Care & Management Training
- Perioperative Nursing Symposium
- Phlebotomy Training
- Podiatry Surgery Radiology Rounds
- Point-of-Care Test
- Policy and Procedure Review
- Preceptor Program
- Pressure Ulcer
- Principles of Sterile Technique for Dermatology & Di Pt. 2 (Skills)
- Professional Nursing: Caring Training and Bariatric Surgical Care
- Professional Nursing: General Surgery & Gastrointestinal
- Psychoactive Drugs
- Radiation Safety
- Regional Charge Nurse Training Program
- Regional Electrocardiogram Workshop
- Regional Pediatric Critical Care Course
- Regional Preceptor Training
- RN Leadership Development Program
- RN Leadership Program
- RN Preceptor Training
- Safe Lifting
- Safe Patient Handling
- Sepsis Prevention/Management
- Simulation Training
- Specimen Collection-Midstream-Urine 2013

- Splint Application
- Splinting
- Spotting Mental Health Problems
- Stroke Education
- Tuberculin Skin Test
- Wound Care 2014

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

SEIU-UHW
United Healthcare Workers West

UNITED HEALTHCARE
WORKERS WEST
SERVICE EMPLOYEES
INTERNATIONAL
UNION, CLC

Dave Regan - President
Stan Lyles - Vice President

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Los Angeles, CA 90022
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www.SEIU-UHW.org

12/11/17

To whom it may concern:

On behalf of the 95,000 Service Employees International Union United Healthcare Workers West (SEIU-UHW), we are writing in support of Kaiser Southern California Medical Group's request for funding. Kaiser and SEIU-UHW have a long standing history of partnering on education and training programs that benefit Kaiser, SEIU-UHW members and our patients.

Funding to assist the training of existing healthcare workforce to ensure that they have the competencies necessary to care for patients and adapt to changing technology, will result in a negative impact on the healthcare workforce. Previous funding has helped to provide training to SEIU-UHW members to better respond to critical events, Emergency Department crisesies and new technology. This funding request will supplement the significant investment from both Kaiser and SEIU-UHW to ensure that workforce is prepared.

Thank you for your consideration and please don't hesitate to contact me if you have any questions.

Rebecca Miller
Director of Workforce
SEIU-UHW
510-890-2213

UFCW LOCAL 770

November 29, 2017

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

Gentle Persons:

UFCW Union Local 770 supports the application of Kaiser Permanente to the
Employment Training Panel to help support training for our members.

If you have any questions, or if I may be of assistance to you, please do not
hesitate to contact me. I can be reached at (213)440-3998.

Sincerely,

UFCW UNION LOCAL 770

Cynthia McGinnis
Union Representative, for
John M. Grant, President

RETRAINEE - JOB CREATION

Training Proposal for:

Automobile Club of Southern California

Agreement Number: ET18-0138

Panel Meeting of: January 24, 2018

ETP Regional Office: San Diego   **Analyst:** J. Davey

PROJECT PROFILE

Contract Attributes:	Retrainee Job Creation Initiative Veterans		Industry Sector(s):	Insurance Services Priority Industry: ☐ Yes ☒ No
Counties Served:	Statewide		Repeat Contractor:	☒ Yes ☐ No
Union(s):	☐ Yes ☒ No			
Number of Employees in:	CA: 8,085	U.S.:13,957		Worldwide: 13,957
<u>Turnover Rate</u>:	4%			
<u>Managers/Supervisors</u>: (% of total trainees)	1%			

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
$599,000		$91,800 50% Job Number 1	$0		$507,200

In-Kind Contribution:	100% of Total ETP Funding Required	$1,343,299

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement	204	8-200	0-60	$450*	$16.70
				Weighted Avg: 60			
2	Retrainee	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement	166	8-200	0-60	$900	$16.70
				Weighted Avg: 60			
3	Retrainee Job Creation Initiative	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement	100	8-200	0-60	$2,000	$13.66
				Weighted Avg: 100			
4	Retrainee Veteran	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement	50	8-200	0-60	$1,320	$13.66
				Weighted Avg: 60			

*Reflects Substantial Contribution of 50% applied to facilities in this Job Number

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Minimum Wage by County:

Job Number 1: $17.50 per hour for Orange County; and $17.54 per hour for Los Angeles County (Corp. H.Q.'s).

Job Number 2: $16.70 per hour for Riverside, San Bernardino, Santa Barbara, Ventura, and other Counties; $17.03 per hour for San Diego County; $17.50 per hour for Orange County; and $17.54 per hour for Los Angeles County.

Job Number 3: $13.66 per hour for Riverside, San Bernardino, Santa Barbara, Ventura, and other Counties; $14.19 per hour for San Diego County; $14.58 per hour for Orange County; and $14.62 per hour for Los Angeles County.

Job Number 4: $13.66 per hour for Riverside, San Bernardino, Santa Barbara, Ventura, and other Counties; $14.19 per hour for San Diego County; $14.58 per hour for Orange County; and $14.62 per hour for Los Angeles County.

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

Used to meet the Post-Retention Wage?: ⊠ Yes ☐ No ☐ Maybe
Up to $2.42 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Numbers 1 & 2		
Business Line Staff		78
Customer Service Staff		156
Information Technology Staff		84
Supervisors/Managers		9
Support Staff		43
Job Numbers 3 & 4		
Business Line Staff		31
Customer Service Staff		60
Information Technology Staff		36
Supervisors/Managers		7
Support Staff		16

INTRODUCTION

Founded in 1900, Auto Club of Southern California (Auto Club) is the Southern California affiliate of the American Automobile Association (AAA) and offers travel, motorist, and insurance services to its members in California and a growing number of other states. The Company also provides travel planning, auto pricing, buying and maintenance services, as well as 24-hour roadside assistance.   Members can renew vehicle registrations, license plates, and stickers at approximately 94 of its club district offices throughout California. The Company is eligible for training under the out-of-state competition provisions. Thirteen locations in Riverside, San Diego, Orange, and Los Angeles Counties will participate in this Agreement. This will be the sixth Agreement between Automobile Club of Southern California and ETP, and the third within the last five years.

In its project ending in April 2013 (ET11-0184), the Company provided training to over 700 incumbent and recently-hired trainees to meet increased growth in membership, insurance, and travel product sales through acquisitions in new markets (Pennsylvania, Ohio, Kentucky, West Virginia, and New York).   Training addressed the need to learn processes, procedures and systems required to sell, service, and support new products in these new markets.

In its most recent ETP project ending in May 2015 (ET13-0361), the Company provided training to 578 incumbent and recently-hired trainees to provide skill enhancement to support the Company's new products, processes, and systems. With advanced skills training, the Company was able to increase employee's skills and provide better service to its members. As an example, the Company was able to deliver advanced skills training to its emergency road service call receivers. This allowed Auto Club to hire more new call receivers as incumbent workers were able to advance in their career paths.

Auto Club is once again expanding. In 2016 alone Auto Club grew by 590 net new employees. Sixty percent of those were in California and the Company is continuing this growth trajectory over the next few years. Auto Club recently opened an expanded insurance call center in Los Angeles. This new facility will be staffed with 250 net new employees over the next two years. It

will be critical for the Company to provide these net new employees with the skills and knowledge necessary to work in the Auto Club environment. In addition, newly-hired and incumbent workers will need skills to sell and support its various products and services, including:

- Building and deploying a technology-focused initiative called "Club Lab." This new lab will focus on technology development for new customer services, including enhanced features in the Company's "app" for member discounts and updated service and navigation features. This new initiative will initially require Auto Club to hire 20-25 net new employees to fully staff this new lab and support the Company's growing business;

- A new product called AAA Onboard, a usage based insurance telematics program that tracks driver mileage and driving behaviors using in-vehicle telecommunication devices (telematics) that are self-installed or already integrated in original equipment installed by car manufactures. This new product will allow Auto Club customers to receive insurance premium discounts, depending on the miles driven and driving behavior; and,

- New claims and dispatching systems to streamline and improve customer service.

Retrainee - Job Creation

In support of job creation, the Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees is reimbursed at a higher rate.

As part of its business expansion, including its new call center, Auto Club plans to hire 100 new employees in California within the next two years (Job Number 3). It will be important for Auto Club to provide these new employees with the knowledge and skills they need to work effectively in their specific job function. To be eligible for reimbursement under this Job Number, trainees must be hired within the three-month period prior to Panel approval or during the term of contract. Substantial Contribution is waived for Job Number 3 trainees, and trainees are subject to a lower wage requirement. These trainees will meet the newly-hired retrainee standard minimum wage.

Veterans Program

The Panel has established a higher reimbursement rate and other incentives for training California veterans. Auto Club plans to hire 50 new Veteran employees in California within the next two years (Job Number 4). It will be important for Auto Club to provide these new Veterans with the knowledge and skills they need to work effectively in their specific job function.

➢ Curriculum

At least 50% of total training in Job Number 4 must consist of vocational skills training. The remaining hours may consist of literacy training, as an exception to the standard 45% limitation.

Training Plan

Training will be delivered in a traditional Class/Lab setting. Training will also be provided via instructor-led E-Learning through Auto Club Virtual Conference Center where the trainees are attending the training via their computer and connected via telephone. The Company will be able to limit the enrollment for these sessions to maintain the required trainer-to-trainee ratio of 1:20.

Some of the skills listed below were provided in the previous ETP Agreement. However, repeat training will be for newly-hired trainees and trainees who were unable to participate in the previous project. Returning trainees will receive upgraded versions of the previous training. Training will not be duplicated:

Business Skills – All trainees will receive Business Skills training such as Business Development/Planning, Meeting Management/Presentation, Client Experience/Service, and other related skills. Trainees will learn skills to better meet new and existing customer requirements and implement the Company's business strategies.

Commercial Skills – Auto Club will provide Commercial Skills training to its Travel/Business Staff and Supervisors/Managers in Claims Special Investigation, Market Expansion, New/Upgraded Auto Club Member Products & Services, and Mobile Dispatch. This will enable trainees to sell and support new, competitive products and services to customers. These skills cover a full-range of travel, insurance, claims and business services and will provide a well-rounded skill set that can be utilized immediately after training.

Computer Skills – Auto Club will provide Computer Skills training to all occupations. Course topics include Claims Portal Skills, Digital Member Services System, and D3 Dispatch System, MS Office (Intermediate/Advanced), and related computer skills. Training will enable trainees to utilize new software and systems to perform and better serve customers.

Continuous Improvement – All occupations will receive training in Continuous Improvement skills in areas such as Developing Teams/Goals/Objectives, Project Management, and Process/Performance Improvement Skills. These skills will enable the workforce to perform more effectively in a team environment; improve the Company's efficiency, productivity, leadership, and decision-making; and implement new working processes.

The Company also plans to use CBT as a delivery method. CBT allows self-paced reinforcement of Class/Lab training at a trainee's workstation. The total allowable CBT hours are capped at 50% of total training hours per trainee.

Substantial Contribution

Auto Club is a repeat contractor that earned in excess of $1,000,000 in its most recent 2 previous ETP contracts that were completed within the last 5 years. A High Earner Reduction of $249,200 (50%) was applied on its previous ETP Agreement (ET13-0361), and a Substantial Contribution of 50% was applied to the incumbent worker component of ET11-0184 at its Los Angeles and Costa Mesa corporate facilities (See Prior Project Table).

In this proposal, the Company submitted a funding request for $183,000 for Job Number 1 incumbent workers at the Costa Mesa and Los Angeles corporate facilities where the Substantial Contribution applies. Accordingly, reimbursement for these trainees will be reduced by 50% to reflect the Company's Substantial Contribution. Substantial Contribution will not be applied to incumbent workers at its remaining California facilities where it does not apply (Job Numbers 2, 3, and 4).

LMS

Staff has reviewed and approved Auto Club's Learning Management System for recordkeeping purposes.

Commitment to Training

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

Auto Club expects to spend approximately $7 million on training in California for 2017/2018. The Company provides ongoing training including basic job skills, business math, advanced grammar, Kronos timekeeper, respect in the workplace, earthquake preparedness, preventative law, anti-harassment, notary seminar and an array of additional skills.

Additionally, the Company has incorporated some of the training initiatives from its previous ETP Contract(s) as part of its ongoing training plan such as Network design/Management/ Troubleshooting/Security Skills. Auto Club will continue to provide this training as necessary for those who have not received these skills, as well as leadership training as required for senior executives.

➢ Training Infrastructure

Auto Club has 92 trainers in California dedicated to its Learning & Development department. Trainers are responsible for training content development, delivery, scheduling, registration, tracking and reporting. The Company's facilities in Costa Mesa maintain several training rooms dedicated to training, including a PC lab classroom for training on the Company's multiple applications. The Company has assigned one individual from that department, along with sufficient support staff at all company locations, to oversee project administration.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $	%
ET13-0361	Statewide	5/6/13 – 5/5/15	$1,498,230	$1,498,230	(100%)
ET11-0184	Statewide	4/4/11 – 4/3/13	$167,115	$167,115	(100%)

DEVELOPMENT SERVICES

Auto Club retained Training Funding Partners (TFP) in Fountain Valley to assist with development of this proposal for a flat fee of $26,500.

ADMINISTRATIVE SERVICES

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

<u>TRAINING VENDORS</u>

To Be Determined

Exhibit B: Menu Curriculum

Trainees may take any of the following:

Class/Lab and E-Learning Class/Lab
Jobs 1-4
8-200 hours   **Business Skills**
o   Business Development/Planning Skills
o   Collaborative Communication Skills
o   Finance/Accounting Skills
o   Client Experience/Service Skills
o   Market Expansion
o   Meeting Management Skills
o   Presentation Skills
o   Successful Sales Interactions
o   Time Management Skills

Commercial Skills
o   Claims Special Investigations Skills
o   Mobile Dispatch Skills
o   New/Upgraded Insurance Products and Services
o   New/Upgraded Travel Products and Services
o   New/Upgraded Auto Club Member Products and Services
o   Insurance Underwriting Skills

Computer Skills
o   Claims Portal Skills
o   Club Lab Applications Skills
o   D3 Dispatch System Skills
o   Digital Member Service System
o   HUON (Not an acronym) System Skills (Insurance Billing system)
o   ACE (Auto Club Enterprise) Insurance Portal System
o   Portal Enterprise Policy Service Center System
o   Intermediate/Advanced Microsoft Office Skills
     ▪   Excel
     ▪   Word
     ▪   PowerPoint
o   Microsoft Access Skills
o   Microsoft InfoPath
o   Microsoft Publisher
o   MRM (Member Relation Management) Portal Skills
o   Mobile Solutions Skills
o   Travel Portal Skills
o   Visio Application Skills

Continuous Improvement Skills
o   Developing Teams/Goals/Objectives
o   Effective Leadership Skills
o   Problem Solving/Troubleshooting
o   Project Management Skills

      ○   Process/Performance Improvement Skills

CBT
Jobs 1-4
0 – 60 Hours

Business Skills

- 2017 TourBook Updates (0.5 hours)
- AAA Hertz Travel Agent Training - Brand Benefits (0.5 hours)
- All – Enterprise Integrated Cashiering (EICS) Common Transactions for Ec (0.75 hours)
- All – Learning the New Car Buying Service for Referrals and Research-AL, MO, VA (0.5 hours)
- All – Member Rewards Credit Card: Online Application (ICE) Process (0.75 hours)
- All – Member Rewards Credit Card: Product Knowledge (0.5 hours)
- All – Metro Transponder Course (0.5 hours)
- All – North American Geography: Alaska Canada Hawaii (1 hour)
- All – North American Geography: Basic Ingredients (1 hour)
- All – Onyx Reassignments Navigator (0.5 hours)
- Amawaterways - External Vendor Training (0.5 hours)
- Amr Resorts Master Agent - External Vendor Training (9 hours)
- Atlantis Ambassador - External Vendor Training (0.5 hours)
- Azamara Club Cruises World Academy - External Vendor Training (3 hours)
- Barbados Elite Club - External Vendor Training (1.5 hours)
- CA Auto Policy - Liability Coverages (0.5 hours)
- CA Auto Policy - Physical Damage Coverages (0.5 hours)
- California Wildfires (0.5 hours)
- Canada Specialist - External Vendor Training (6 hours)
- Cancun Tourism Institute - External Vendor Training (1.5 hours)
- Caymankind Specialist - External Vendor Training (1 hour)
- CBT – AAAuto Pay for Texas (0.75 hours)
- CBT – EFTI Overview for Membership (0.5 hours)
- Celebrity 5 Star Academy - External Vendor Training (12 hours)
- Certified Sandals Specialist - External Vendor Training (5 hours)
- Claims – 20 Point Total Loss Program for Calif. (0.5 hours)
- Claims – Claimdirector (8 hours)
- Claims – Getting to Know Your Automobile: Frame and Structure (0.5 hours)
- Claims – Medicare (8 hours)
- Crystal Cruises Goes All Inclusive - External Vendor Training (1 hour)
- Cunard Americas Module - External Vendor Training (0.66 hours)
- Cunard Commodore - External Vendor Training (3.75 hours)
- Disneyland Resort Module - External Vendor Training (1 hour)

- Disneyworld Resort Module - External Vendor Training (1 hour)
- ERS – Hertz and Enterprise Car Rental – Premier Members (0.5 hours)
- ERS – Hertz and Enterprise Car Rental-Classic and Plus-2011 (0.5 hours)
- ERS – Hot Calls (0.67 hours)
- ERS – Inclement Weather Service Situation (0.5 hours)
- ERS – Independent Contract Station Equipment Overview (7 hours)
- ERS – Servicing Recreational Vehicles (0.5 hours)
- Hawaiian Destination Specialist - External Vendor Training (2 hours)
- Holland America Academy - External Vendor Training (6 hours)
- Holland America Alaska Cruises 2017 - Part 1 (0.75 hours)
- Holland America Alaska Cruises 2017 - Part 2 (0.5 hours)
- Hyatt Travel Specialist - External Vendor Training (3 hours)
- Ins – Calif. Verified/Not Verified Mileage – Prime for Sales-PMG-Und (0.5 hours)
- Insight Vacation Specialist Program - External Vendor Training (0.75 hours)
- Jamaica Travel Specialist Course - External Vendor Training (1 hour)
- Magic of Mexico Specialist - External Vendor Training (2 hours)
- Marriott Hotel Excellence - External Vendor Training (6 hours)
- Member Choice Vacations Specialist - External Vendor Training (1 hour)
- Oceania Cruise Expert - External Vendor Training (1 hour)
- Official State of Alaska Specialist Training - External Vendor Training (6 hours)
- Outrigger Hospitality Specialist - External Vendor Training (3.5 hours)
- Pleasant Holidays - Destination Caribbean - External Vendor Training (0.5hours)
- Pleasant Holidays - Destination Hawaii - External Vendor Training (2.5 hours)
- Pleasant Holidays Cruises (Updated 2017) (0.75 hours)
- Pleasant Holidays USA Webinars - External Vendor Training (1 hour)
- Policy Management Group (PMG) – AAA Onboard – Device, Insurance, And Teen Safe Driver Program (0.5 hours)
- PMG – Address Change Amendment Orders (0.5 hours)
- PMG – CA Home ITV Refresher (0.5 hours)
- PMG – California Amendment Order Enhancements (0.5 hours)
- PMG Sales – AAA Onboard Insurance Program for TX (0.5 hours)
- Princess Alaska Expert - External Vendor Training (2 hours)
- Princess Canada & New England Module - External Vendor Training (0.75 hours)
- Princess Caribbean Module - External Vendor Training (0.66 hours)
- Princess Come Back New - External Vendor Training (0.5 hours)

- Princess Hawaii Tahiti South Pacific Module - External Vendor Training (2 hours)
- Princess Pacific Coast & Mexico - External Vendor Training (0.65 hours)
- Princess European Module - External Vendor Training (3.75 hours)
- Puerto Rico Travel Expert - External Vendor Training (1 hour)
- Rail Europe - TRAC - External Vendor Training (1.5 hours)
- Regent Seven Seas Cruises University - External Vendor Training (1 hour)
- Rocky Mountaineer Specialist - External Vendor Training (1.5 hours)
- Royal Caribbean University of Wow - External Vendor Training (40 hours)
- Sales – ACE Information Accuracy Audit: Error Criteria Uniformity (0.5 hours)
- Sales – AssureSign – Your E-Signature Solution 2014 (0.75 hours)
- Sales – CA AIP Auto Amendment Orders (1 hour)
- Sales – CA Jewel to HUON (0.58 hours)
- Sales – FCRAN and Procedures for Quote and New Business – TX Sales (0.5 hours)
- Sales – IM Opportunities ACMO (0.68hours)
- Sales – IM Referrals (0.6 hours)
- Sales – Incomplete AO Process for California Sales (0.5 hours)
- Sales – Transaction Tracking and Routing for California Sales (0.75 hours)
- Seabourn Academy - External Vendor Training (4 hours)
- Starwood Pro Certification - External Vendor Training (5 hours)
- Trafalgar Super-Agent Certification - External Vendor Training (0.5 hours)
- Travel – 2014-2015 Pleasant Holidays Brochure – Maui (0.5 hours)
- Travel – 2014-2015 Pleasant Holidays Brochure – South Pacific (0.58 hours)
- Travel – 2015 Pleasant Holidays Brochure – Caribbean – Part 2 (0.58 hours)
- Travel – AICweb and Auto Travel Reference Materials Index (0.66 hours)
- Travel – Air Module 01: Get Started with Apollo® (0.75 hours)
- Travel – Air Module 02: Check Availability and Sell Flights (0.83 hours)
- Travel – Calculating Distance Using Maps (0.5 hours)
- Travel – Holland America Line – Alaska – What's New for 2014 (1 hour)
- Travel – International Driving Permits (0.5 hours)
- Travel – North American Geography – Location of States (0.5 hours)
- Travel – Online Attraction Tickets 2: Selling Tickets (0.9 hours)

- Travel – Online Attraction Tickets: Mgmt. and Admin Functions 1 (0.5 hours)
- Travel – Online Attraction Tickets: Universal Studios Orlando (0.5 hours)
- Travel – Southwest Vacations For Las Vegas – Part 1 (0.5 hours)
- Travel – Southwest Vacations For Las Vegas – Part 2 (0.5 hours)
- Travel – United States Geography Made Easy (0.5 hours)
- Travel Agent - Cruise 101 (0.5 hours)
- Travel Bound - Travel Bound Tutorial - External Vendor Training (1.5 hours)
- Uniworld River Cruise Specialist Program - External Vendor Training (1.5 hours)
- Vancouver Specialist - External Vendor Training (5 hours)
- Viking River Cruise - External Vendor Training (3 hours)
- Wage and Hour for Managers and Timekeepers (0.75 hours)

Computer Skills

- All – Enterprise Integrated Cashiering (EICS) Common Transactions for ACMO (0.75 hours)
- All – Enterprise Integrated Cashiering (EICS) Virtual Workbook Part 1 For ACMO (0.75 hours)
- All – Enterprise Integrated Cashiering (EICS) Virtual Workbook Part 2 For ACMO (0.75 hours)
- All – FIRM: Forecasting Using Statistical & Mgmt. Report Tool (SMART) (0.83 hours)
- All – FIRM: Overview of iProcurement Navigation (0.5 hours)
- All – MRM Portal – Maintain Customer-Member Screen (0.5 hours)
- CBT – MRM Portal Insurance – HUON Insurance Payments (0.5 hours)
- CBT – MRM Portal Insurance – Prime PC AO (0.5 hours)
- CBT – MRM Portal Travel – Travel Portal Quote Sheet (0.75 hours)
- E-resourceplanner System – Administrative Functions (0.5 hours)
- E-resourceplanner System Overview (1 hour)
- Microsoft Outlook 2010 Organization Tips (0.5 hours)
- MRM Portal Overview (1 hour)
- Pleasant Agent Booking Engine (Updated 2017) (0.5 hours)
- PMG – Follow-Up Opportunities in MRM Portal (0.5 hours)
- Tech Connect User Portal for Service Requests and Computer Problems (0.5 hours)
- Upgrade to Microsoft Office 2010 (0.5 hours)

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

TRAINING PROPOSAL FOR

Correctional Medical Group Companies, Inc.
17-0772

Panel Meeting Date:	01/24/2018
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:		**$ 407,520.00**	
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$ 407,520.00	N/A	$ 0.00	$ 650,500.00

APPLICANT PROFILE

Company Summary	Correctional Medical Group Companies, Inc. (CMGC) provide on-site medical and behavioral health care services exclusively to county jails and detention facilities across the United States.

Industry Sector(s)	Healthcare		
Priority Industry	Yes		
No. Employees (Applicant)	**State:** 736	**US:** 983	**World Wide:** 983
Turnover Rate (Applicant)	0.00 %		
Repeat Contractor	No		
High Unemployment Area	Yes		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	CMGC plans to enhance employee skills in all areas of inmate care to successfully support the Company's business growth and improve business processes and services while remaining in compliance with changing regulatory 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	Retrainee	566	$ 18.00	40	$ 720	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

CMGC will hold this ETP Contract and administer training for its subsidiary company, California Forensic Medical Group (CFMG).

Founded in 1983 and located in Monterey, CFMG currently employs 2,000 professionals, serves 62 counties and 111 facilities in 8 states, and cares for more than 25,000 inmates. Over the past three decades, the Company has become the largest private provider of correctional healthcare services in California. CFMG is dedicated to providing responsive, innovative, high quality, and cost-effective medical, mental, health, and dental services to California counties.

2. Current Training Project Details

Purpose of Training	CFMG experienced an increase in awarded contracts in 2016 and is expecting further growth in the coming years. To support this growth and the associated demands for services, CFMG has committed to improving business processes. The enhancement of business processes will include updated best practices and standardized procedures of regulatory agencies such as county, state, federal, licensing, and certifying organizations. To improve processes, the Company is also implementing a new Electronic Medical Records (EMR) Software system.
	Additionally, with contracts in 31 California counties, training for CFMG's workforce will create uniformity in processes and quality care services. The Company has developed a formalized training program to ensure consistency in employee performance and knowledge and will include new protocols, policies, and documentation required for inmate safety and care.
	ETP funds will enable CFMG to invest in employee training and development to improve inmate care experience, increase productivity, and create a high-skilled workforce.
Training Infrastructure and Administrative Plan	Training in this proposal will be provided by in-house trainers at CFMG's worksites (county jails and detention facilities statewide).
	CFMG's location manager and Human Resources (HR) staff will schedule training and collect rosters. Rosters will then be sent to CMGC corporate offices where they will be maintained. CFMG also retained a subcontractor to assist with administration of the ETP-funded training.
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 Computer, Continuous Improvement, and Medical Skills (Didactic) will be provided to approximately 566 workers (Administrative Support, LVN/Medical Assistant, Registered Nurse, Technician, Therapist, and Manager/Supervisor).	

4. Additional Company or Training Project Details

Medical Skills

The Panel has established a "blended" reimbursement rate for nurse upgrade training, recognizing the higher cost of delivery for the Clinical Preceptor model.

Approximately 216 Registered Nurses, 199 Licensed Vocational Nurses (LVNs)/Medical Assistants, 9 Technicians, and 46 Therapists will participate in Clinical Didactic training classes.

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	$ 9,500.00
Administrative	Training Funding Source	Seal Beach	Not to exceed 13.00% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing
Provided below are details on the types of training planned for this proposed Training Project.

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	**Planned Course Offerings**
Computer Skills (Standard)	Electronic Medical Records
	Medical skills
	Microsoft Office
	Online Resources
	Order Entry
Continuous Improvement Skills	Case Management/Discharge Planning
	Communications /Conflict Resolution
	Crisis Prevention Intervention (CPI)
	Critical Thinking Skills
	Culturally Appropriate Care
	Documentation Skills
	Organizational procedures
	Performance and Quality Improvement Procedures
	Team Building
Medical Skills (didactic)	Advanced Cardiac Life Support (ACLS)
	Basic Life Support (BLS)
	Behavioral Health
	Birth and Beyond
	Cardiac Patient
	Charge Nurse
	Clinical Reasoning
	Code Blue Response & Procedures
	Critical Care
	Decontamination Procedures
	Diabetes Care
	Dialysis: Peritoneal & CRRT
	Dysrhythmia Recognition & Interpretation
	EKG & Cardiac Monitoring
	Electronic Fetal Monitoring
	Equipment Skills
	Evidence Based Practices
	Gastrointestinal Assessment and Management
	Infection Control
	Intravenous (IV) Insertion & Therapy
	Joint Commission, CMS, MERP, CDPH, Stroke
	Kinetic Therapy
	Labor, Delivery and Postpartum
	Medical Emergency
	Medical Process skills

Medical/Surgical Skills
Medication Administration & Management
NIH Scale- Neurological Assessment
Oncology Skills
Orthopedic Skills
Patient and Family Education
Patient Assessment & Care
Patient Handling Skills
Patient Rights/Confidentiality
Pediatric Advanced Life Support (PALS)
Pre- and Post-Operative Care
Psychiatric Patients
Rapid Response Skills
Renal Assessment Replacement Therapy/Management
Respiratory Assessment/Protocol/Care
Restraints
Stroke Patient
Telemetry
Total Parenteral Nutrition (TPN)
Transfer Techniques
Trauma Skills
Triage Skills
Ventilator and Tracheotomy Care
Wound & Skin Care

STATE OF CALIFORNIA
ETP
EMPLOYMENT
TRAINING PANEL

Retrainee – Job Creation
Training Proposal for:

BPM LLP

Agreement Number: ET18-0155

Panel Meeting of: January 24, 2018

ETP Regional Office: San Francisco Bay Area   **Analyst:** D. Woodside

PROJECT PROFILE

Contract Attributes:	Retrainee SET Job Creation Initiative		Industry Sector(s):	Financial Services
				Priority Industry: ☐ Yes ☒ No
Counties Served:	Contra Costa, Napa, San Francisco, San Mateo, Santa Clara, Sonoma		Repeat Contractor:	☒ Yes ☐ No
Union(s):	☐ Yes ☒ No			
Number of Employees in:	CA: 405	U.S.: 437		Worldwide: 449
Turnover Rate:	13%			
Managers/Supervisors: (% of total trainees)	N/A			

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
$306.000		$0	$0		$306,000

In-Kind Contribution:	100% of Total ETP Funding Required	$376,650

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET	Business Skills, Computer Skills, Continuous Impr	240	8-200 Weighted Avg: 35	0	$525	$30.36
2	Retrainee SET Job Creation	Business Skills, Computer Skills, Continuous Impr	150	8-200 Weighted Avg: 60	0	$1,200	$13.66

Minimum Wage by County: Job Number 1 (SET/Statewide): $30.36 per hour
Job Number 2 (Job Creation): $15.18 per hour for Contra Costa, Santa Clara, San Francisco and San Mateo counties; and $13.66 per hour for Sonoma and Napa 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 Number 1.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Operations Staff		45
Client Service Associates/Seniors/Supervisors		75
Client Service Project Manager I		50
Client Service Project Manager II		25
Accounting Manager		20
Operations Project Manager/Director I		15
Operations Project Manager/Director II		10
Job Number 2		
Operations Staff		25
Client Service Associates/Seniors/Supervisors		85
Client Service Project Manager I		20
Client Service Project Manager II		5
Accounting Manager		5
Operations Project Manager/Director I		5
Operations Project Manager/Director II		5

INTRODUCTION

Founded in 1986, BPM LLP (BPM), formerly known as Burr Pilger Mayer, Inc., is headquartered in San Francisco with four additional offices located in California: Palo Alto, San Jose, Walnut Creek and Santa Rosa. 412 of its employees work in Northern California. Workers at all five locations will be trained under this Proposal.

BPM is a full-service accounting firm providing financial reporting, tax planning and compliance, business advisory, and business management services. BPM has a diverse client base crossing many industry sectors including: technology (semiconductor, software, hardware, Internet/online media), real estate and hospitality, biotechnology and life sciences, manufacturing and distribution, and not-for-profit organizations including private charities and foundations.

Because the majority of BPM's customers are located in California, the Company does not face out-of-state competition and will be funded under Special Employment Training (SET) for frontline workers.

This is BPM's third ETP Agreement and the third in the past five years. The repeat retrainee population will receive training in topics they have not previously been trained on under prior ETP Agreements. Topics repeated from the prior agreement will only be attended by new employees or employees that have not attended before.

Retrainee - Job Creation

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

BPM reports that its market focus and client base has doubled in the previous two years resulting in the need to expand its California workforce and retrain its incumbent workforce. One example is the addition of a newly-acquired cyber security firm, Info@Risk, in Washington state. With this added area of expertise, BPM's California workers will be required to be trained for this industry in order to meet client demand in California.

Another expanding market opportunity for BPM is Cryptocurrency. The Company reports that It is becoming easier to use Bitcoin to pay for everyday purchases. Tax laws around this commodity continue to build, as the idea catches on. Training on the new laws effective next year is being built in-house, as part of the proposed training curriculum.

BPM's annual revenue growth has averaged more than 20% per year for the last several years, and projects accelerated expansion of 33% over the next five years. This is attributed in part to rapid industry changes stemming from new legislation. These changes are positively affecting business by expanding markets and increasing customer demand overall.

The Company expects to hire and train 150 new employees (Job Number 2) over the next two years. The Company must expand business capacity to keep pace with market demands. The newly hired workers will be accommodated in BPM's existing California offices where space is currently available. This proposal continues the success of BPM's Job Creation effort in previous ETP Agreements: of the $212,872 earned under its second contract, $140,400 (66%) of the funding trained net new California employees; and of the $201,732 earned for its first Agreement, $88,915 (44%) was job creation.

the date-of-hire for all Job Creation 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 Agreement.

Substantial Contribution

Substantial contribution is not applicable, because the Contractor has not earned $250,000 for retraining. The Total Earned in the previous five years for regular retraining was $185,289. The remaining ETP funding supported Job Creation training. (Substantial contribution is not applicable to Job Creation)

PROJECT DETAILS

Training Plan

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

Business Skills: Training will be offered to all occupations. Training will include topics on new tax provisions, cryptocurrency, cybersecurity, assurance financial services, technology client training, and skills training for new associates. Training will also include communication and presentation skills, negotiation skills, business writing, and marketing and client services.

BPM's training focus for Job Creation trainees will be on BPM's specific and customized finance and accounting process. New employees must acquire the necessary knowledge and skills to serve clients. BPM has individual plans for each new employee that contains customized training, and certification recommendations and requirements for an employee's first year of employment.

In addition, training will include Learning Plan Maps which is due to launch January 2018. These maps will be used as customized training plans for one to five-year staff.

Computer Skills: Training will be offered to all occupations, and enable workers to create databases, spreadsheets, reports, charts, graphs and professional presentation materials for clients. Training will also provide an understanding of Cloud Computing, project management tools, online meeting tools, customer management software, several database tools, and analysis tools related to various financial tax, audit, and accounting processes. Additional training in BPM's new learning management system, and tax software system, CCH Workstream End User Training will also be provided.

Continuous Improvement: Training will be offered to all occupations and includes leadership, coaching, and team-building skills. Training will ensure that individuals responsible for coaching, mentoring, or managing projects are consistent with BPM's procedures. Trainees will gain the skills to work individually and on teams to effectively deliver an array of financial services and to produce a strong, accurate and ethical work product. The topics aim to help trainees learn how to solve problems, make effective decisions, and generate innovative ideas to solve customers' business issues. These skills are increasingly important as BPM expands into new industries with advanced technology.

E-learning

BPM intends to deliver some training topics as E-learning. Instructor information will be maintained in BPM's LMS. Also, the ETP Agreement requires verification of trainer-to-trainee ratios which must be kept within the ETP-required 1:20 or less. E-learning training offers the Company additional ways to deliver training at the convenience of the training population.

SET Frontline Worker

The Company uses several job classifications with a "Supervisor" or "Manager" or "Director" in the title. These employees do not have the ability to hire or fire, and spend the majority of their work hours as frontline workers performing the same responsibilities as other employees in their occupation. Based on the nature and scope of their job duties, these employees are a mixture of exempt and non-exempt employees. Therefore, they meet the Panel's definition of frontline workers.

LMS

BPM will utilize a previously approved Learning Management System to track training.

Commitment to Training

The Company's ongoing training includes introductory computer skills, health and safety skills, company policies and procedures, new hire orientation, personal roles and responsibility, Partner training, CPA seminars and conferences for employees' annual requirements, and anti-harassment training. The annual budget for training is currently $1,280,000 for all California facilities. ETP funds will not displace the existing financial commitment to training.

➢ Training Infrastructure

The ETP-funded training and administration will be managed by a Learning and Development Manager, an LMS administrator, and dedicated internal training staff, who successfully managed BPM's last ETP Agreement. An administrative subcontractor will assist with program administration and data entry.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET16-0122	Multi Counties	7/30/15-7/29/17	$211,500	$201,005 (95%)
ET13-0133	Multi Counties	10/01/12-9/30/14	$320,445	$212,872 (66%)

ET13-0133: The lower than expected performance was due, in part, to recordkeeping issues. In addition, the Company did not adjust for its cycle of peak business periods, which continuously interrupted training. Training was further impacted when the Training Manager was transferred to a new position only six months after contract approval. All these issues were resolved in a later contract by implementing an LMS, scheduling training during non-peak periods and using staff with ETP experience to administer training.

DEVELOPMENT SERVICES

California Training Administration (CTA) in Rocklin assisted with development for a flat fee of $2,500.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab and E-learning Hours
8-200 (Job Numbers 1 and 2)

Trainees may receive any of the following:

BUSINESS SKILLS
- On Boarding Finance/Accounting Processes (Job Creation Only)
- Strategic Implementation/Strategic Planning
- Best Practices/Expectations
- Business Development
- Business Writing Skills
- Consumer Product
- Cross Serving Skills
- Effective/Influential Communications
- Effective Presentations
- Emotional Intelligence
- High Net Worth Individual
- Negotiation Skills
- Professionalism
- Tax Rules & Regulation Updates
- Technical Research – Case Studies
- Learning Plans:
  - Associate 1
  - Associate 2
  - Senior
  - Supervisor
  - AuditWatch Level 1 (New Auditors)
  - AuditWatch Level 2 (1 Year Auditors)
  - AuditWatch Level 3 (2 Year Auditors)
  - AuditWatch Level 4 (Senior Auditors)
- Client Services:
  - Client Relations & Management First Impressions
  - Account Management
  - Corporate Tax Techniques
  - Cyber Security
  - Employee Benefit Plans
  - Financial Planning
  - Financial Services
  - HR Management & Planning
  - International Tax
  - Referral Mastery
  - Small Business Accounting
  - State & Local Tax
  - Stock Compensation/Stock Options

- Tax Services:
  - Accounting Methods & Periods
  - Combined & Consolidated Tax
  - Estate Tax
  - Gift Tax
  - Hedge Funds
  - IC DISC Tax Incentive
  - Partnerships
  - Tax Provisions
  - Transfer Pricing
  - Trusted Issues
  - Trust & Charitable Remainder Trust Returns
- Assurance Services:
  - Accounting & Auditing Update
  - Accounting for Leases
  - Accounting Methods & Techniques
  - Legal Writing/Regulatory Guidance
  - Nonprofit Accounting & Auditing
  - Pension Plan Accounting & Auditing
  - Trusted Advisor
  - Revenue Recognition
  - 4 Quick C's to Powerful Presentations
  - The Feature Benefit Link
  - The So What of Features to Benefits
- Advisory BEST Services & Skills:
  - Business Advisor Role – Buying & Selling
  - Work-Paper Reference for Financial Statements
  - Manual Tax Return Preparation
  - Asset Sale vs Stock Sale
  - Bookkeeper Training
  - Benchmarking by Industry
  - Succession Planning for the Business Owner
  - Not for Profit (Beginner/Advanced)
  - Fixed Assets/Accounts Receivable
  - Month End Close (Modules 1 & 2)
  - Auditing Private Companies
  - Fundamentals of Researching
  - Effective Interest Rate Method
  - Payroll Testing for Private Companies
  - Accountability for Clients
- Sales & Marketing Training:
  - Client Development Mastery
  - Referral Source Mastery – Leads
  - Building a Powerful Personal Brand that Draws Clients
  - Marketing Tactics
  - Pursuit & Prospect Mastery
  - In-Charge Transition

COMPUTER SKILLS

All Employee Systems & Tools
- Adobe
- CCH Workstream End User
- Go File Room
- Lynda.com tools
- Microsoft Tools (Word, Excel, PowerPoint – Int. & Adv only)
- Quickbooks
- Paylocity
- Reflektive System
- Sharepoint
- Social Media Tools (LinkedIn, Twitter, Facebook)
- XeroAssurance/Tax Systems & Tools
- Engagement Tax Software
- LC Vista Learning Management System
- LearnLive System
- Lever (Tracking System)
- Netsuite
- Practice Management System
- SurePrep (Tax Prep tools)
- Assurance Tools:
    - Accounting Research Manager
    - Active Data
    - Audit Planning & Support
    - Wolters Kluwer's CCH IntelliConnect
    - Wolters Kluwer's CCH Document Training
    - Confirmation.com
    - Epace
    - Intacct
    - Lync Messenger
    - Dynalinking
    - Marketing Production Software
    - Microsoft Dynamics CRM System
    - Optimization Training
    - Prosystems Tax System
    - Validis
- Tax Tools:
    - Bloomberg BNA, Tax Management System
    - Wolters Kluwer's CCH Tax Processing Software
    - Skype Messenger
    - Zoom Videoconference Tools

Advisory BEST Systems & Tools
- Bill.com (Expert/Guru)
- Intacct
- Intuit
- Trapponline
- Outlook
- Lync Messenger
- Marketing Production Software

- Stafftrak
- Sharefile

Human Resources Tools
- Payroll & HR System Training (Workday)
- Applicant Tracking System (Lever)

CONTINUOUS IMPROVEMENT
- Building a Powerful Personal Brand
- Customer Service (In person/by phone)
- Efficiency/Quality Improvements
- Internal Customer Service
- Managing Multiple Priorities/Time-sensitive Deadlines
- New Senior/Supervisor Techniques
- Problem Solving/Process Improvement/Process Innovation
- Project Management Skills
- Team Building/Team Meetings
- Situational Leadership:
    - Managing & Leading Change
    - Coaching/Motivating Others to Excellence
    - Motivating Multi-Generations in the Work Place
    - Coaching Millennials
    - Advanced Communication Skills
    - Train-the-Trainer
    - Building High Performing Teams

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

TRAINING PROPOSAL FOR

International Business Machines Corporation
18-0545

Panel Meeting Date:	01/24/2018
Regional Office:	San Francisco Bay Area Regional Office
Analyst Name:	Lily Lai
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:		**$ 734,076.00**	
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$ 734,076.00	N/A	$ 0.00	$ 2,564,000.00

APPLICANT PROFILE

Company Summary	Founded in 1911, International Business Machines Corporation (IBM) (www.ibm.com) provides Information Technology (IT) products and services worldwide. It creates, designs, markets, manufactures, and sells advanced technologies including computer systems, software, networking systems, storage devices, cloud computing, data analysis, data warehousing and web content delivery to a global customer base in a myriad of industries.

Industry Sector(s)	Professional, Scientific, and Technical
Priority Industry	Yes
No. Employees (Applicant)	**State:** 6,000 **US:** 7,0000 **World Wide:** 36,0000
Turnover Rate (Applicant)	2.45 %

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

TRAINING PROFILE

Training Objective(s)	To remain competitive and in the forefront of innovation, IBM must retrain and enhance employees' skills to better serve its clients by solving complex business and technical issues, providing consulting, process design, systems integration, and software application design and management.

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	1942	$ 18.00	21	$ 378	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

IBM invents and applies technology to help solve clients' most difficult business and competitive problems. It is the diversity and breadth of the Company's portfolio -- spanning hardware, software, services, research, financing and technology - that uniquely separates IBM from other companies in the IT industry.

IBM is aligned around a single-focused business model: Innovation. It participates in the highly competitive IT industry, where competitors vary by industry segment and range from large multinationals to smaller, more narrowly focused entities. IBM creates business value for its customers and solves business issues through integrated solutions that leverage IT and deep knowledge of the business processes. IBM solutions typically create value by reducing a customer's operating costs, or by enabling new capabilities that generate revenue. The solutions draw from an industry leading portfolio of enterprise software, systems and technology, delivery and implementation services, financing and consulting.

IBM is committed to leading the development of state-of-the art technologies, and the products and service offerings built around them, and measures its performance by how well it helps clients.
The Company's business model is built to support two principal goals: helping enterprise clients to become more innovative, efficient and competitive through the application of business insight and IT solutions; and providing long-term value to shareholders. The business model has been developed over time through strategic investments in capabilities and technologies that have superior long-term growth and profitability prospects based on the value they deliver to clients.

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 will be IBM's seventh ETP Agreement, its third in the last five years. Training in this proposal will focus on new and/or updated technologies. Some courses from the previous Curriculum may be included in this proposal but will not be duplicated for any trainees. Demand is surging. Technical skills are being sought not only by traditional technology companies, but also by banks, manufacturers, retailers, insurers, healthcare providers and others increasingly reliant on technology. In addition, technical literacy is critical for functions as varied as IT, finance, marketing and logistics. Simultaneously, the supply of technical workers is more unpredictable. Considerable uncertainty surrounds government programs that facilitate the entry of technologists into the United States, further constraining companies' ability to meet their technical needs.

	IBM needs to ensure the skills, training and education of its employees remain at the leading edge of this digital transformation and provides training in a number of critical digital technologies. One such is Cloud computing, often referred to as "the cloud," for the delivery of on-demand computing resources. Cloud-based applications—or software as a service—run on distant computers "in the cloud" that are owned and operated by others and that connect to users' computers via the internet.
Training Infrastructure and Administrative Plan	A Project Executive and Project Manager are assigned to administer this Agreement. The Company's Learning Management System (LMS) will be used to manage registration and track training data and progress during the contract term. The LMS has been reviewed and approved by ETP. IBM will also retain CMTA to perform administrative duties such as enrollment, tracking training hours, and invoicing. Training will be delivered by in-house subject-matter experts and vendors if necessary. Training will be delivered through Class/Lab, E-Learning, and Computer-Based Training. IBM's current annual training budget for California is $9.5M.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	IBM has not earned more than $250,000 at any one location in the previous five years; therefore, substantial contrubiton is not applied. Over the last five years, IBM has earned a total of $531,278 statewide across multiple locations.

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, Computer and Management Skills as identified (Attachment 2).	

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

PROPOSED TRAINING PROJECT DETAILS

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	

Delivery Method/Level	E-Learning - Instructor Led/Distance Learning
Summary	
All occupations (Attachment 1) will receive training in Business, Computer and Management Skills as identified (Attachment 2).	

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
Computer-Based Training (CBT)	The majority of the training requested under this proposal is technical skills training in high level programming languages; implementing and integrating newly acquired technologies; and training in developing solutions for clients. IBM develops and offers over 5,000 CBT courses through its LMS.
	On average, IBM estimates that trainees will receive 50% of training hours via CBT. Some trainees will receive up to 100% of the ETP training via CBT to allow for a flexible training program to meet training needs on a Just-In-Time basis as trainees can access training as needs arise. In the last ETP Contract, IBM delivered 21,170 (56%) CBT hours out of the total 37,497 reimbursable hours.

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	None selected to date	N/A	N/A
Administrative	California Manufacturers	Sacramento	Not to exceed 13% of earned funds
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.

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**
ET16-0273	Statewide	12/14/15 – 12/13/17	$388,378	$388,378	100%
Notes	Training and retention were completed by July 2017, five months early.				
ET12-0183	Statewide	11/28/11 – 11/27/13	$424,575	$142,900	34%
Notes	ET12-0183: IBM did not include the San Jose facility in order to focus training at other regional sites in California that received a small portion of training under the previous ETP Agreement. However, over 4,000 hours of training was completed at the San Jose site at a cost of over $300,000 during the Agreement term. Had the San Jose site been included, IBM would have met all training objectives and earned 100% of funds. This low performance was an anomaly since IBM performed well under two previous Agreements: 100% (ET10-0166) and 83% (ET07-0188).				

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	2H Opportunity Pass Automation Initiatives / SCOR
	Achieving Sales Excellence with Social Selling
	Adobe Seller Masterclass
	Advanced Sales Leadership
	Automotive, Aerospace & Defense Industry Works
	Banking & Financial Management Jump Start
	Best Practices for Selling IBM SPSS Statistics
	Beyond the Twilight Zone (Supplier, Scope and Pro
	Building Pipeline with Client-Centric OI
	Business and Industry Insight Program
	Buyers - Developers
	CAI AMSI/Cloud, Analytics, Mobile, Social - Getti
	CAI Canada Sales & Delivery Leader Education
	CAI NextGen EA Growth Platform Workshop
	Consulting by Degrees Leadership Skills Workshop
	Create a Distinctive Experience Learning Lab and
	Customer Engagement & Design: Client Service & Se
	Customer Temperament: Strategies to Build Better
	Delivery to Sales
	Driving Client Value with Services - Mandatory NA
	Energy & Utilities Workshop
	ES Accelerate Progressive Learning Refresh after
	Finance Facilitator Excellence
	Financial Selling - Executive Conversations class
	GBS Core Capabilities: Experienced to Expert (E2E
	GBS Core Capabilities: Expert to Leader
	GBS Core Capabilities: Foundation to Experienced
	GBS Cornerstone Session 1
	GBS Cornerstone Session 2
	GBS ISA Sellers Enablement Program
	GBS NA Sales Immersion
	GBS NA Sales Immersion Program
	GBS Partners Industry training
	Global Industry Co-Lab Summit
	Global Sales School CE (ES) STD Lab/FTP Kickoff
	Global Sales School CE (NS) CTD Lab/CE Kickoff
	Global Sales School CE (NS) FTP Lab/DWS Kickoff
	Global Sales School CE (NS) STD Lab/DWP Kickoff
	Global Strategic Conversations

Attachment 2 - Training Delivery and Curriculum Listing

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

	Greater China Group Smarter Selling Academy
	Healthcare & Life Sciences Industry Workshop
	How to Win Deals by Leading with Social Media Ana
	IBM Human Resource Summit
	IBM Services & Solutions Top Gun
	IBM Storage Solutions Top Gun
	IBM Systems & Platform Top Gun
	IBM-Adobe North America Roadshow
	Industry Learning Lab
	Insight Selling to the CxO
	Insurance Jump Start Session
	Leading Major Client Partnerships (LMCP), Lab A
	Leading Major Client Partnerships (LMCP), Lab B
	Leading Major Client Partnerships (LMCP), Lab C
	MEA Smarter Selling Industry Academy
	North America Block Chain Seller Workshop
	NSJ Sales College
	NSJ Sales College for New Sellers
	Partner Summit
	Sales Execution Excellence for Mana+B114gers - NA
	SAP Finance Transformation in the S/4 Digital Era
	SAP Sales & Solutioning in the S/4 Digital Era
	Strategic Negotiating
	Telecoms and Media & Entertainment Industry Works
	Value Driven Proposals (VDP), 1 Day Account Team
	Value Driven Proposals(VDP) for CBDers
	Which Software and Service Agreements do your Cli
	Why Your Clients Will Buy More From You
	Winning with Industry Solution in GTS (Global Tec
Computer Skills (Standard)	Accelerating Growth on the Oracle Cloud: IBM's Ca
	Advanced Technical Eminence
	Agile education from Scrum Alliance
	Agile for EPH
	Agile Product Ownership [F2F-APO]
	Agile Program and Operations Fundamentals [F2F-AA
	Agile Program Fundamentals
	AP Distribution Sector Colab
	Apple and IBM Experts 2.1 Workshop
	Apple and IBM Partnership (AIP) Regional Seller W
	Application Innovation: Charting Our Course in th
	Architectural Thinking

Attachment 2 - Training Delivery and Curriculum Listing

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

Azure Big Data and Analytics Bootcamp
Big Data Sales Academy - (Hadoop and SPARK)
Block Chain Developer
Blockchain Technology Workshop
Bluemix Garage Architect Advanced Bootcamp
Bluemix Garage Training
Bootcamps with IBM Design
Breakthrough Technical Eminence
Building your Success with IBM Cloud Object Stora
CbD Digital Accelerator Workshop
Cloud Sales Acceleration Workshop
Cloud, Analytics, Mobile, Social Solutioning Work
Competing to win with the Watson Analytics/Cognos
Data Science Bootcamp
Demystifying Security: Starting a security conver
Design Thinking Workshop (GPSD)
Digital Change Fast-start co-creation event
Digital Reinvention and Design-based Consulting,
Digital Strategy Fundamentals
Distinguished Engineers Workshop
EA Methods, Tools & IMPACT Industry Solutions in
Enterprise Architecture
ExperienceOne/Amplify
External Agile Training leading to a certificatio
FED@IBM Hackademy
Global Business Services Mobile Sellers Workshop
IBM Big Data and Analytics Top Gun
IBM Bluemix Garage Designer Bootcamp
IBM Bluemix Garage Method Developer Bootcamp
IBM Bluemix Solution Architect Foundaitons Bootca
IBM Design Thinking - Advanced (2d)
IBM Design Thinking for Client Engagement
IBM Design Thinking for Executives
IBM Design Thinking for Practitioners
IBM Design Thinking Foundations (2d)
IBM Enterprise
IBM Services & Solutions Top Gun
IBM Software Defined Storage Infrastructure Top G
IBM Systems & Platform Top Gun
IBM Systems Technical University
IBM World of Watson

Attachment 2 - Training Delivery and Curriculum Listing

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

	IBV Learning and Collaboration Event
	Innovations in Transformation
	Integrated Business Processes in SAP S/4 HANA (TS
	Internet of Things (IOT) Sales Champions
	Intro to IBM Cloud and Competitive Landscape
	IOT (Internet of Things) Agile Account Clinic
	IOT (Internet of Things) Masterclass
	LD300: Leading the Transformation
	Maestro - Face to Face offering
	Mastering Opportunities for IBM Bluemix IaaS (Sof
	Microsoft Dynamics Customer Service (including CR
	Microsoft Dynamics New AX (AX7) - Delta Training
	Microsoft Internet of Things - Connected Field Se
	MobileFirst for iOS - Project Management
	MobileFirst for iOS Experts Program : Session 2
	Objection Handling - NA IDS SW Team ONLY Topic
	OM (Offering Management) Fundamentals
	Oracle Financials Cloud: Financials Implementatio
	Oracle North America Service Line Leadership Summ
	Oracle Sellers Training
	Other (PDE Leadership) External Vendor Training
	QMF quadrature mirror filter II
	Regional Technical Exchange
	SAP Customer Centricity in the S/4 Digital Era
	SAP Process, Methods & Tools
	SAP Sales & Solutioning
	SAP Supply Chain Transformation in the S/4 Digita
	Server Side Swift (SSS) Development
	Smarter Workforce
	Storytelling for Global Business Services
	Succeeding with Live Engage Chat - Mandatory NA I
	TandE Digital Change Management Workshop
	Technical Women's Pipeline Workshop
	Think 2018 - Access the latest innovations, insig
	Tririga Application Development Bootcamp
	Watson Developer Cloud (WDC) Hack-a-thon
	Watson Explorer - Advanced Edition (Analytics Com
	Watson Explorer Foundational Components 201 (WE 2
	Watson Knowledge Studio Workshop (WKS201)
	Women in Technology International (WITI)
Management Skills	AccEL (Accelerate Executive Leadership)

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

Accelerate Executive Presence
Advanced MicroMBA Program for Research - Almaden
Breakthrough Value Leadership
Building Relationships and Influence for IBM Lead
Business and Industry Insight
Business Partner Engagement
Business Storytelling for Sales
Catalyst - Leaders of Change (Session II)
Catalyst Enterprise Session I- development for Ex
Catalyst Enterprise Session II - development for
Catalyst: Leaders of Change Program
Complex Program Management Master Class
Executive Insights for Executive Leaders New to I
Facilitator Activation I. with IBM Studios Austin
Get Essential! Delivery Excellence
GTS (Global Technology Services) T&T TTIE Growth
Leadership Insights
MD 102 - Manager Impact through Signature Experie
MD 201 - Creating a Culture of Empowerment
MD 201 - Leading a Culture of Signature Experienc
MD 202: Cultivating Empowerment and Accountabilit
MicroMBA for IBM Research-Almaden
MicroMBA Program for Research - Almaden
PE Growth Leadership Accelerator
Present with Eminence
Project Management Principles
Sink or Swim - Resolving Difficult PM Challenges
Territory Management
Transformation Leadership

Delivery Method /Level	*E-Learning – Instructor Led/Distance Learning*
Training Type (Level)	**Planned Course Offerings**
Business Skills	2-Year New Sellers Journey for Experienced (1 of
	2-Year New Sellers Journey for Experienced (2 of
	2-Year New Sellers Journey for Experienced (3 of
	2-Year New Sellers Journey for Experienced (4 of
	2-Year New Sellers Journey for New Sellers (1of 4
	2-Year New Sellers Journey for New Sellers (2of 4
	2-Year New Sellers Journey for New Sellers (3of 4
	2-Year New Sellers Journey for New Sellers (4of 4
	Executive & High Band Integrated Success Plan
	Financial Selling : Conducting Client Financial-B

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

	Financial Selling : Developing Client Financial I
	Financial Selling : Developing High-Level Estimat
	Global Sales School CE (ES) DWS Review/CE Kickoff
	Global Sales School CE (ES) FTP Review/DWS Kickof
	Global Sales School CE (ES) Kick Off
	Global Sales School CE (NS) DWP Review/FTP Kickof
	Global Sales School CE (NS) DWS Review/CTD Kickof
	Global Sales School CE (NS) FTP Review
	Global Sales School CE (NS) Kick Off
	Industry Gold - Sprint 1: Industry Landscape
	Industry Gold - Sprint 2: Industry Outlook
	Insight Selling to the CxO - Virtual Kickoff
Computer Skills (Standard)	Advanced Excel
	Advantage Suite Data Model Fundamentals for Analy
	AIS Mobilization - Web 2.0 and Related Technology
	Cloud, Analytics, Mobile, Social, Security Overvi
	E-Commerce solutions in EA
	ES Accelerate Practitioners Fundamentals & Practi
	GTS (Global Technology Services) Chief Architect
	IBM Omni-Channel Merchandising Extended Overview
	IBM Omni-Channel Merchandising Markdown Optimizat
	IBM Omni-Channel Merchandising Price Optimization
	IBM XIV Technical Training
	IBM z Systems: Technical Overview of HW and SW Ma
	Immigration Determination Tool (IDT)
	Interconnecting Cisco Network Devices Part 1 (ICN
	Interconnecting Cisco Network Devices Part 2 (ICN
	Leveraging SAP System Refresh Automation
	Maestro Development Program Kickoff
	Maestro LVC #2: Market Forces/Strategic Conversat
	Module 1: Compliance Management & Audit
	Module 2: Account Management
	Module 3: IAM and Policy Management
	Module 4: Patch, Health Checking, and System Acc
	Module 5: Issue, Risk, & RCA Management
	Module 6: Network Services & Regulatory Managemen
	Module 7: CWP Tool Hands-On
	Module 8: ECM Tool Overview
	Omni-Channel Merchandising Price Optimization Upd
	Oracle Cloud learning webinar session
	Oracle Financials Cloud: Payables to Cash Managem
	Oracle Financials Cloud: Receivables to Collectio
	Oracle Procurement Cloud: Procurement Implementat

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

	PLD Skilled Resource Delivery
	Process Excellence Lean Six Sigma Black Belt Educ
	Process Excellence Lean Six Sigma Green Belt Educ
	SAN Volume Controller (SVC) Planning and Implemen
	Solutioning Workbench (SWB) Tool Orientation - BP
	SSE - Apache Hadoop Fundamentals on Power Systems
	SSE - Docker Essentials for Power Systems
	SSE - Essentials of PowerVM
	SSE - IBM Cloud Object Storage: Implementation an
	SSE - IBM Cloud Orchestrator for POWER Systems
	SSE - IBM Cloud PowerVC Manager I: Essentials
	SSE - IBM Spectrum Accelerate Implementation
	SSE - IBM Spectrum Scale (GPFS) I: System Adminis
	SSE - IBM Spectrum Scale Advanced Administration
	SSE - Red Hat Storage Management
	SSE - RedHat Storage Management
	SSE - Storage Area Network Fundamentals
	SSE - Ubuntu Server Installation and Administrati
	Systems of Insight - How Analytics and Watson Pro
	Talent Development & Optimization Capability
	Team Solution Design Workshop
	USSE - AIX Internals & Performance III: I/O Manag
	USSE - Essentials of PowerKVM
	USSE - IBM PowerVM Virtual I/O Server I: Configur
	USSE - IBM PowerVM Virtual I/O Server II: Advance
	USSE - PowerLinux Administration
	USSE - PowerLinux Performance Management
	YOU and the Client experience - Business Acumen
Management Skills	Agile for Project Managers
	Converting Strategy Into Action
	Creating Client Value :The Fourth Dimension
	Customized Strategic Enablement: Management Devel
	Cutomized Management Development Module (MDM)
	Emerging Leaders - Strategy and Finance for Leade
	Executing Complex Programs
	Getting Oriented for Managers - Performance Manag
	Getting Oriented for Managers - Role of the IBM M
	Giving And Receiving Feedback
	Innov8 Project Manager - Facilitated discussion
	ITS Engagement Leadership Workshop On-Line
	Kenexa Leadership Assessments Workshop
	Leadership in a Project Team Environment
	Leading Change from the Middle for Project Manage

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

	Leading Engaged Teams
	Leveraging the Customer Relationship
	Managing Low Performers
	Managing Your Project Finance - for Partners and
	Mastering the Project Portfolio
	MD101 LVC - Essentials to Lead
	MD103 LVC - Interpreting the Success Profile Feed
	PM Pro Certification (PMP) 5.0 (5th Ed Aligned) E
	PM Pro Certification (PMP) 5.0 (5th Ed, PMI Updat
	Project Management Basics - Understanding basic e
	Project Management Basics- Managing Risks and Com
	Project Management Fundamentals
	Project Troubleshooting and Recovery
	Review for Experienced Project Managers Applying
	The IBM Master Black Belt for a New Era
	Whole Brain Thinking (HBDI) Team Workshop

Delivery Method /Level	*E-Learning – Computer Based Training (CBT)*	
Training Type (Level)	**Planned Course Offerings**	**Standard Hours**
Business Skills	101 Consumer Package Good Overview & Value Chain	0.75
	101 Introduction to the Health Care Industry	1.50
	101 Introduction to the Retail Industry	0.50
	102 Inside Health Care Providers	2.00
	102 Overview of Key Retail Processes	1.00
	103 Inside Health Care Payers and Plans	2.50
	104 Retail Key Performance Indicators	1.50
	105 Supply Chain	1.00
	106 Retail IT Architecture	1.00
	109 Retail - E-Commerce	1.00
	201 Business of Health Care Providers	2.50
	202 Business of Health Care Payers	2.00
	3D in Every Deal On-line Education	2.00
	3DD On-line Education Module	1.00
	Accounting 101	0.83
	Accounts Payable Overview	1.00
	Accounts Receivable Overview	1.00
	Advanced CSat Topics for OOs, OO Mgrs. and Select	0.58
	Advanced Revenue Recognition: Multiple Elements A	0.75
	Africa Credit Risk Management	1.50
	Air segment fundamentals	0.75
	American Honda Motors KYC	0.50
	An overview of IGF Workbench	1.00

Attachment 2 - Training Delivery and Curriculum Listing

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

Automotive Commercial Vehicles	1.00
Banking Financials (Industry Itinerary)	1.00
BI (Business Intelligence) Method Overview	1.00
Black Swan-Enable improved preparedness and respo	0.71
Business Acumen	1.00
Business Analysis Requirements Elicitation	2.00
Business Analysis: Introduction to Requirements A	2.50
Business Analysis: Verify and Validate Requiremen	2.00
Business Case Methodology	1.00
Business Continuity & Financial Risk Management	1.00
Business Controls for Global Administration	1.50
Business of Consumer Payments	2.00
Business of Core Banking	1.01
Business of Investment Banking and Trading	2.00
Business of Life Insurance	1.50
Business of Retail Banking	2.00
Business Partner Essentials: Understanding and Wi	1.00
Business Writing: Editing and Proofreading	1.00
Business Writing: How to Write Clearly and Concisely	1.00
Campaign Planning - Performance Marketing Essenti	1.00
CBV Financial Acumen (Client Business Value)	1.00
CBV Selling: Identifying Business Issues	1.00
Chemicals and Their Hazards	2.00
Client Value Method: Client Value Proposition	1.00
Competitive Intelligence: Planning and Direction	1.00
Consumer Products Industry Overview	2.00
Country Financial Risk Scorecard	1.50
Credit Risk Management	1.50
CSat Awareness and Skills for All Sellers and Sel	0.55
Customizing your IGF value proposition	4.00
Developing as a Trusted Business Advisor through	1.50
Developing Strong Customer Relationships	1.00
Domain Webinar - BFM (Banking and Financial Manag	1.50
Electrostatic Discharge (ESD) Damage Protection	1.00
Electrostatic Discharge (ESD) Prevention	1.00
Energy and Utilities Financials	1.00
Engineered Nanoparticles: Environmental	0.75
Enhanced Risk Management as a Global Process Owne	1.00
Events Experience - Performance Marketing Essenti	1.00
Excel Module 1-Data Visualization	0.50
Facilitating Virtual and On-site Teams	4.00

Attachment 2 - Training Delivery and Curriculum Listing

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

Finance Enrichment Series - Session #10 - Corpora	2.00
Finance Enrichment Series - Session #8 - Introduc	2.00
Financial Integrity Set the Tone- Revenue Recogni	0.50
Food and Beverage Segment Fundamentals	2.00
Foreign Exchange Risk Management	0.76
Freight logistics	0.75
Fundamentals of Lean Six Sigma	2.00
Fundamentals of Purchasing and Vendor Management	1.00
Getting Ready for your Next Conversation	2.00
Global Business Services Learning and Knowledge T	1.00
Global FA O2C Domain Mastery Program - Billing-GP	4.00
Global Process Services Root Cause Analysis	0.55
Government Industry Overview for Global Delivery	8.00
GPS Smarter Commerce Managed Services	1.00
GSS only - CBV Financial Acumen	1.00
Healthcare Industry Overview for Global Delivery	7.00
Hearing Conservation	1.00
HL7 and Its Applications in Healthcare	4.00
Human Resources Core Knowledge	1.00
IBM Analytics Campus (WW) PLATFORM TECH SALES	40.00
IBM Analytics Campus (WW) SALES	40.00
IBM Analytics Campus (WW) SOLUTIONS TECH SALES	40.00
IBM Analytics Sales Academy @ Insight	8.00
IBM and Corporate Executive Board (CEB) Joint Web	0.90
IBM Business Continuity Risk Management	0.58
IBM Client Delivery Experience	1.00
IBM Global Financing (IGF) Workbench University	1.50
IBM Global Financing fraud awareness ()	0.50
IBM Kenexa Recruitment Process Outsourcing	0.75
IBM Principles of Supply Chain Management - Modul	0.50
IBM Signature Selling Method	0.50
IBM WW CDS BLACK BELT SALES TRAINING AND KICK OFF	40.00
Identifying and Managing Customer Expectations	1.00
Indirect Tax Case Study	1.00
Indirect Taxes	1.00
Industry Oriented Knowledge - Oil and Gas Industr	0.50
Inside Corporate Financial Services	1.00
Inside Financial Services - Industry Overview	2.50
Inside General (P&C) Insurance	2.00
Inside Life Insurance	2.00
Inside Media and Entertainment Industry Overview	0.66

Attachment 2 - Training Delivery and Curriculum Listing

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

Inside Telecommunications, Media and Entertainmen	0.66
Intro to RPO Pulse (team communication program)	0.50
Introducing Enterprise Architecture (EA) & the IT	1.00
Introduction to Ad Sales	1.00
Introduction to Business Analysis and Essential C	2.00
Introduction to Business Analysis Planning	2.50
Introduction to Cloud Computing with Successfacto	2.83
Introduction to the Pharmaceutical Industry	0.75
ISC3317E Protecting IBM Confidential Information	0.50
Key Trends and Business Challenges	1.00
Know Your Client Kaiser Permanente	0.50
Know Your Industry: HealthCare	7.00
KYC - Bank of America	4.00
Lead Hazard Awareness	1.00
Life Sciences Financials (Industry Itinerary)	1.00
Management Approval of Disbursement for People	0.50
Manager Roadmapping in SalesConnect	1.50
Managing Currency Risk in Service Deals	1.08
Managing Risk through Tehcnology from an Internal	1.03
Managing Service Level Agreements	0.50
Mastering Negotiation	1.50
Mastering Selling to the CFO	20.00
Media and Entertainment	4.00
Media and Entertainment Broadcasting KPIs	0.75
Mobility for Retail and Consumer Products	1.00
Negotiation Essentials: Communicating	1.00
Negotiation Essentials: Avoiding Pitfalls	1.00
Negotiation Essentials: Planning for Negotiation	1.00
Negotiation Tips Webinar	0.50
New Product Development	1.00
NFPA 70EE Electrical Safety in the Workplace	2.00
Operations and Supply Chain Management	1.00
Overview of Pharmacy Benefit Manager	4.00
PE Business Financial Acumen: Banking	2.41
PE Business Financial Acumen: Financials & Insura	2.41
PE Business Financial Acumen: Good & Services	2.41
Performance Engineering: Delivering Successful Pr	22.00
Pharmaceutical and Medical Device Development and	0.50
Post Sales Service & Support Client Data Handling	0.50
Post-Sales Service and Support Client Data Handli	1.00
PR3231XS Blue Book Detail	2.50

Attachment 2 - Training Delivery and Curriculum Listing

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

PR3240XS Procurement Contracting	2.50
PR3257XS Global Quality Framework	1.00
PR3260XS Procurement Processes	1.50
PR3268XS Introduction to the Client Services Proc	1.00
PR3282XS Introduction to Intellectual Property	1.00
PR3299XS Procurement Support	1.50
PR3301XS Statement of Work Fundamentals	1.50
PR3302XS Successful Navigation of IBM's Contracts	1.50
PR3311XS Participation Agreement Webinar	0.50
PR3312XS Health Insurance Portability and Account	1.00
Preview of SalesConnect	0.58
Quickstart for TeamSD	1.50
Rail segment fundamentals	0.75
Regulatory Compliance in Financial Services	1.00
Research Division Defense Service ITAR Training	0.58
Retail Financials (Industry Itinerary)	1.00
Retail Foundation	4.00
Retail Industry Overview for Global Delivery	8.00
Revenue Recognition Education for Software and Sy	1.00
Risk Management in Financial Services	2.00
Risks in Investment Pricing	0.66
Roadmapping for Success in SalesConnect for Manag	1.00
Roadmapping for Success in SalesConnect for Selle	1.50
Root Cause Analysis	2.00
SaaS Technical Sales Essentials: 1- Strategy	1.00
SaaS Technical Sales Essentials: 2- Cloud & SaaS	1.00
SaaS Technical Sales Essentials: 3 - Discovery	1.00
SaaS Technical Sales Essentials: 4- Tenancy	1.00
SaaS Technical Sales Essentials: 5- Security	1.00
SaaS Technical Sales Essentials: 6- Land & Expand	1.00
Sales Manager Essentials - Coaching-Focused Caden	1.00
Sales Manager Essentials - Developing Your Reputa	1.00
Sales Manager Essentials - Effective Hiring: The	1.00
Sales Manager Essentials - Increasing Individual	1.00
Sales Manager Essentials - Leverage Every Resourc	1.00
Sales Manager Essentials - Maximizing the Individ	1.00
Sales Manager Essentials - Performance Management	1.00
Sales Manager Essentials: The Essentials of Coach	0.50
Sales Performance Management	0.50
SalesConnect Essentials - Managers	1.00
SalesConnect Essentials - Sellers	1.00

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

SalesConnect Foundations	1.50
SE Coaching Guide: Deployment Driven Success	0.50
SE Coaching Guide: Financial Selling	0.50
SE Coaching Guide: Prospecting	0.50
Selling Essentials Introduction	1.00
Selling Essentials: Building Strategic Business V	1.00
Selling Essentials: Call Planning	1.00
Selling Essentials: Client Experience	1.00
Selling Essentials: Compelling Reason to Act	1.00
Selling Essentials: Contracts for SaaS Solutions	1.00
Selling Essentials: Deal Progression Scorecard	1.00
Selling Essentials: Deployment Driven Success	1.00
Selling Essentials: Financial Selling	1.00
Selling Essentials: Five Steps to Prospecting	1.00
Selling Essentials: iPad Essentials	0.50
Selling Essentials: Negotiations	1.00
Selling Essentials: Proposal Excellence	1.00
Selling Essentials: Prospecting Part I, Essential	1.00
Selling Essentials: Sales Tools: Driving the Clie	1.00
Selling Essentials: Selling SaaS Solutions Part 1	1.00
Selling Essentials: Selling SaaS Solutions Part 2	1.00
Selling Essentials: Social Selling is Smarter Sel	1.00
Selling Essentials: Value Proposition	1.00
Selling Essentials: Who Else Cares? Finding New	1.00
Selling Essentials: Win Plan	1.00
Selling financing with IBM and Business Partner s	1.50
Selling the Total IGF Value Proposition QuickView	0.75
Serve-Ability: Transforming Customer Service	0.75
Social Media Marketing Listening strategy	1.00
Social Selling with SalesConnect	6.00
Solution Selling vs Product Selling	0.50
Strategy & Transformation Logical Thinking & Writing	3.00
Telecommunications business Processes (eTOM)	1.00
Telecommunications KPIs	0.75
Tetramethyl Ammonium Hydroxide (TMAH) Safety	1.00
The Automotive Industry Overview	1.00
The Banking Industry Overview: Version 3	1.00
The Oil and Gas Industry Overview	1.00
The Principles of Financial Management	2.50
The Process of Negotiation	2.00
Toxic Gas Safety	0.75

Attachment 2 - Training Delivery and Curriculum Listing

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

	Travel related services overview	0.75
	Understanding Organizational Change	1.00
	US Export Controls	1.00
	Using Analytics to Drive Action	16.00
	Using the Lease versus purchase tool in your sale	4.00
	Using Value Modeler	1.00
	What You Need to Know About Risk Management	1.50
	Wholesale Distribution Financials	1.00
	Wholesale Segment Overview	2.00
	Workforce Analytics Engine - Forecasting Module	2.00
	Writing a Business Case	2.50
Computer Skills	"Business Analytics and Optimization QuickStart -	1.00
	.NET Overview: Windows, Web, and the Cloud	3.50
	2007 IBM System Storage Strategy & Overview - I	0.65
	2007 IBM System Storage Strategy & Overview - II	0.60
	3. Selecting Systems	0.50
	3592 J1A Tape Drive Maintenance Training	1.00
	3592-J70 and 3590-A60 Fibre Attached Drives	1.00
	8203-E4A IBM POWER6 Model 520 Hardware Training	4.00
	9037 Model 2 Sysplex Timer	2.00
	9117-MMA and 9406-MMA Power6 Model 570 Hardware T	3.00
	A Technical Introduction to Web Services (Web-bas	8.00
	Administration of IBM Business Process Manager St	32.00
	Adv Data Preparation Using IBM SPSS Modeler (V15)	8.00
	Adv Data Preparation Using IBM SPSS Modeler (V16)	8.00
	Adv Data Preparation Using IBM SPSS Modeler (v18)	8.00
	Advanced Formats and Layouts in Excel	1.00
	Advanced Formatting in Excel 2007	2.00
	Advanced Formulas and Functions in Excel	1.00
	Advanced Predictive Modeling using IBM SPSS Model	8.00
	Advanced Python	1.50
	Advanced Tools for Managing Multiple Projects wit	1.00
	Advanced Topics in Java EE Web Services	16.00
	Advanced Web Attacks and Countermeasures	4.00
	Agile Programming and Testing	2.00
	AIS IGSDF Awareness	1.00
	AMS Solutioning Essentials	12.00
	An Introduction to Mobile Java Technologies, Java	8.00
	An Overview of Agile Methodologies	1.50
	Analytics and Data - Performance Marketing Essent	1.00
	Analytics Essentials: AML Monitoring and Analytic	0.50

Attachment 2 - Training Delivery and Curriculum Listing

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

Analytics Essentials: Analytics Platform	0.50
Analytics Essentials: Analytics Portfolio and Vis	0.50
Analytics Essentials: Asset Analytics for Rotatio	0.50
Analytics Essentials: Automotive - Point of View	0.50
Analytics Essentials: Banking - Improve Customer	0.50
Analytics Essentials: Banking - Manage Risk and F	0.50
Analytics Essentials: Banking - Point of View	0.50
Analytics Essentials: Behavior-based Audience Ins	0.50
Analytics Essentials: Behavior-based Client Insig	0.50
Analytics Essentials: Behavior-based Customer Ins	0.50
Analytics Essentials: Business Intelligence and P	0.50
Analytics Essentials: Cloud Data Services	0.50
Analytics Essentials: COPLINK on Cloud for Law En	0.50
Analytics Essentials: Electronics - Build Dynamic	0.50
Analytics Essentials: Electronics - Point of View	0.50
Analytics Essentials: Electronics - Provide Diffe	0.50
Analytics Essentials: Enterprise Content Manageme	0.50
Analytics Essentials: Financial and Operational P	0.50
Analytics Essentials: Financial Markets - Point o	0.50
Analytics Essentials: Financial Markets - Trading	0.50
Analytics Essentials: Government - Point of View	0.50
Analytics Essentials: Industry Solutions Executiv	0.50
Analytics Essentials: Information Integration and	0.50
Analytics Essentials: Insurance - Point of View	0.50
Analytics Essentials: Introduction	0.50
Analytics Essentials: Market Domains and Analytic	0.50
Analytics Essentials: Media and Entertainment - C	0.50
Analytics Essentials: Predictive Customer Intelli	0.50
Analytics Essentials: Predictive Maintenance and	0.50
Analytics Essentials: Safer Planet	0.50
Analytics Essentials: Threat Intelligence Analysi	0.50
Analytics Essentials: Welcome to Rapid Analytics	0.50
AP Global Business Services Integrated project pl	1.00
Apache Hadoop	2.00
API Economy Services Offerings run through	32.00
API Management Concepts	4.00
Architecting Innovation with Clients	3.00
Asset Management for IBM WebSphere Commerce Versi	1.50
Audit Readiness	0.50
Basic Problem Determination for the IBM Flex Syst	0.50
Batch Processing in IBM Cúram 6.0.5	4.00

Attachment 2 - Training Delivery and Curriculum Listing

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

BECOMING PRODUCTIVE IBM TOOLS YOU NEED NOW	1.00
Big Data, Hadoop, and Analytics	6.66
BladeCenter Fundamentals	12.00
Bluemix Local and Platform Updates - Tech Worksho	40.00
Boolean	0.50
BP IBM Procurement for Project Managers	0.50
BPM Process Analysis Methods I	8.00
Brocade Fibre Channel Product Training 2	2.83
Building A Responsive Data Center Strategy	0.83
Building Client Value: You Can't Make This Up	0.50
Business Architecture Fundamentals	7.50
Business Performance and Financial Measures in Si	2.00
Business Suite 7.0 Webinar Series - Transportatio	1.00
BusinessObjects XI Universe Design	13.00
Capability Maturity Model Integration (Capability	0.75
Capability Maturity Model Integration (CMMI) - Ad	3.00
Catalog Management for Direct Sales Store for IBM	1.50
Catalog Upload for IBM WebSphere Commerce V7	1.00
CCS_Powered by Watson_OO-Solutioner Education_Fou	1.21
Certified Ethical Hacker (CEH) v8: System Hacking	2.00
Certified Information Systems Security Profession	2.50
Change Management	3.00
Change Management and the Client Experience/La ge	0.50
Change Management Process for SAP	1.00
Changes to Certified Information Systems Security	0.50
CICS TS - Miscellaneous Commands, CICS and DB2 (D	4.00
CISA Domain: The Process of Auditing Information	2.50
Cisco SWITCH 1.0: Analyzing Campus Network Design	1.00
CISSP: Asset Security	1.50
CISSP: Communication & Network Security Design	2.00
CISSP: Identity and Access Management	2.00
CISSP: Risk Management	1.50
CISSP: Security Assessment and Testing	1.50
CISSP: Security Engineering Part 1	2.00
CISSP: Security Engineering Part 2	2.00
CISSP: Security Operations Part 1	2.00
CISSP: Security Operations Part 2	1.50
CISSP: Security Operations Part 3	1.50
CISSP: Security Principles, Governance, and Guide	1.50
CISSP: Software Development Security	1.00
Client Expansion Mobile App	0.50

Attachment 2 - Training Delivery and Curriculum Listing

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

Client Impacting Event	1.00
Client Impacting Event Power Systems	1.00
CLISTS Introduction	6.00
Cloud Application Architect and Developer Bootcam	1.50
Cloud Application Innovation: Technical introduct	1.00
Cloud Computing Basics	1.50
Cloud for Global Business Services Sellers - Anim	1.00
Cloud Workload Analysis Cloud Affinity Tool	1.00
Clustering and Association Models with IBM SPSS M	8.00
CMSD Security Policy Education	0.50
Cognos Business Intelligence	5.00
COGNOS Fundamentals of Data Modeling for Framewor	2.16
Communication Skills for Software Developers	0.50
Compliance Academy - Introduction to Security Com	0.50
Compliance Academy - Refresher Course	2.00
Compliance and IBM's Security Processes	1.00
Compliance Fundamentals	1.00
CompTIA Cloud+ CV0-001: Cloud Fundamentals	2.00
Concepts of Storage - Part 1	0.50
CPWR6AB1 - How to Use the Hardware Management Con	3.00
Create and Maintain DB2 (Database) UDB Programs	4.00
Creating and Customizing Visual Elements in Excel	1.00
Creating and handling cases with Salesforce for L	0.50
Creating Presentations in PowerPoint	1.00
Creating Secure Software	3.00
Cross-Platform Shared Code in and Xamarin.Forms i	2.50
Crystal Reports XI Report Design II Business Repo	12.00
Cúram SPM Platform for Business Analysts V6.0.4	40.00
Curam SPM Platform for Developers (Customization)	40.00
Customer Security Document for Delivery Teams	1.00
Cyber Security Workstation Compliance for Non-US	0.50
Cybersecurity and Privacy for IBM India Contracto	1.00
Cybersecurity and Privacy for IBMers	0.58
Cybersecurity for Digital IBMers	1.00
DASHboarding Made Simple	40.00
Data Access and Services with Microsoft Azure	3.00
Data Center - Physical Security in IBM/ITD Data C	1.00
Data Center Consolidation and Relocation Services	0.50
Data Center Outages	0.50
Data Management and Manipulation with IBM SPSS St	16.00
Data Model and Service Mapping for InfoSphere MDM	24.00

Attachment 2 - Training Delivery and Curriculum Listing

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

	Data Replication Essentials - WBT	8.00
	Data Search, Data Validation, and Macros in Excel	1.50
	Data Security Services - Foundations	0.83
	DB2 (Database) Fundamentals	4.50
	DB2 (Database) Fundamentals V11	4.00
	DB2 (Database) Overview	2.00
	DB2 (Database) SQL Fundamentals V11	3.00
	DB2 (Database) Stored Procedures	2.50
	Decoding Analytics for Strategy & Transformation	2.50
	Defining Users to RACF	6.00
	Delivery Catalyst - Foundation	7.00
	Dev Apps in Bus Process Manager Adv V8.5.5 - I	40.00
	Dev Apps in Bus Process Mgr Adv V8.5 - I	40.00
	Dev Rule Solutions in Opl Decision Mgr V8.5	40.00
	Dev Rule Solutions inOp Decision Mgr V8.7	40.00
	Developing REST APIs with Node.js for IBM Bluemix	8.00
	Developing the User Experience in ASP.NET MVC	3.50
	Developing, Publishing, and Managing APIs with IB	24.00
	Development Planning and Risk Analysis	3.00
	DevOps Assessement	12.00
	Digital Analytics for IBMers	16.00
	Digital Workplace of the Future Executive Kickoff	1.08
	DPE Compliance Academy - Introduction to Tooling	1.00
	e-TOC Advanced Education	2.00
	e-TOC Practitioner Education	0.75
	Effective Practices for Quality Analysis	3.00
	Electrical Engineering 101 for Data Centers Modul	0.75
	Empowering Your Digital Strategy with Cloud, Anal	10.00
	Enhanced Driver Maintenance for z Systems	2.50
	Enhancing PowerPoint Presentations	1.00
	Enterprise Data and Cloud Interaction	1.50
	Enterprise Security Services Ordering System (ESO	2.50
	ePolicy 2.1 Basic Roles Education	0.50
	EPS4583 - Servicing the IBM POWER8 800112C (IBM	3.50
	EPS4584 - Servicing the IBM POWER8 800122C (IBM	3.50
	EPS4585 - Servicing the IBM POWER8 8335-GTB (IBM	2.50
	ES41426B - Multitool and ECuRep file handling	0.50
	ES41551 March Block Release for ThinkServer, Sy	0.75
	ES41580B Introduction to OneCLI Utility	1.00
	ES41637 Lenovo XClarity Administrator release 1	3.00
	ES41641B - Servicing the Lenovo Converged HX Seri	1.50

Attachment 2 - Training Delivery and Curriculum Listing

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

ES41665 - Servicing the Omni-Path Fabric Edge Swi	1.00
ES71295B - Servicing the Lenovo NeXtScale nx360 M	1.00
ES71538 - Servicing the Lenovo ThinkServer sd350	2.00
ES71585 - Servicing the Lenovo ThinkServer TS150	2.25
ESS092F0 IBM Model 92F SAS Expansion Enclosure	2.00
ESS283X0 - IBM DS8880 R8 service traininging	1.00
ESS283X2 IBM DS8880 R8.2 service training	1.00
ESS340X0 - IBM Cloud Object Storage System Servic	2.00
ESS35920 - IBM 3592-EH7/EH8 Rack-mount Service Tr	1.00
ESS98470 - IBM DeepFlash 150 Service Training (MT	2.00
Essentials for Coding	3.00
Essentials for Unit Testing	3.00
Essentials of IBM Rational Team Concert V2.0	8.00
Essentials of Red Hat Linux 5	13.00
Essentials of Secure Engineering	1.00
Essentials of Web Application Security	2.50
Estimating Effort for Development Tasks	3.00
Excel - Intermediate Part I	0.50
Excel - Intermediate Part II	0.50
EXPORT REGULATION FOR NEW EMPLOYEES	1.00
EZC4550 T3 SSR Reference Material Training for	2.50
EZC4558 T3 Education for z13s and z13 GA2 Secon	2.50
EZC4944 - z13 & z13s Installation Planning Traini	1.50
Fibre Channel and Storage Area Networks Fundament	3.00
Finalizing a PowerPoint Presentation	1.00
Finding Cost Savings in AMS Deals	1.00
Fit for Purpose Methodology for IBM Architects	1.50
Flash Storage Fundamentals - SPVC	4.00
Fundamentals of Cúram SPM Platform for Bus Analys	40.00
Fundamentals of IBM Cúram SPM Platform for Develo	40.00
Fundamentals of Software Testing	2.50
Fundamentals of the IBM Cúram SPM Platform for De	40.00
Fundamentals of the Java Programming Language, Ja	16.00
GA61547 Global Systems Skills Exchange (GLOSSE)	1.50
GBS Cloud Capabilities and Offerings Overview	1.00
GBS Open Source Software Awareness Training	0.75
GBS Standard Delivery Solution (OPAL) Rational co	2.00
GBS Standard Delivery Solution Rational Team Conc	0.50
Getting Started with Angular JS	2.00
Getting Started with Project Management Structure	0.75
Getting Started with the OnDemand Process Asset L	0.75

Attachment 2 - Training Delivery and Curriculum Listing

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

Global Business Services TDA Training	3.00
Global Delivery Steady State Opportunity Identifi	0.50
Global security education - Introduction to the s	1.00
Global SLE Storage Community: Getting Started	0.50
Global Solutions Architecture Repository (GSAR) B	0.75
GP40843B - Servicing the IBM POWER7 8246 Systems	4.00
GP40846D - Servicing the IBM PureData System for	3.50
GP40847 - Servicing the IBM EXP30 Ultra SSD I/O D	2.50
GP40850C - Servicing the IBM POWER7 9117-MMB, 917	4.00
GP40852 - Servicing the IBM POWER7 9119-FHB	4.50
GP40976 - Servicing the IBM 7042-CR7 Hardware Man	3.50
GP41046 - Servicing the IBM POWER7 8202 and 8205	4.00
GP41048B - Servicing the IBM POWER7+ 8408-E8D, 82	3.50
GP41113B - Servicing the IBM POWER7 8231-E2B, 823	4.00
GP41347 - Servicing the IBM 7042-CR8 Hardware Man	1.00
GP41348C - Servicing the IBM PCIe Gen3 I/O expans	2.50
GP41493 - Servicing the IBM 7042-CR9 Hardware Man	4.00
GP41533 - Servicing the IBM POWER8 8348-21C syste	3.00
GP41564 Servicing the IBM PurePower 8374-01M	1.00
GP41565 Servicing the IBM Elastic Storage Serve	1.00
GP41583B - Servicing the Mellanox EDR 100 Gb Infi	4.00
GP61205 - Servicing the IBM POWER8 8247-21L, 8247	3.00
GP61205B - Servicing the IBM POWER8 8247-21L, 824	3.50
GP61205C - Servicing the IBM POWER8 8247-21L, 824	3.50
GP61344C - Servicing the IBM POWER8 9119-MME and	4.50
GP61344D - Servicing the IBM POWER8 9119-MME and	4.50
GP61344E - Servicing the IBM POWER8 9119-MME/MHE	4.50
GP61467 - Servicing the IBM POWER8 8408-E8E (IBM	3.00
GP61467C - Servicing the IBM POWER8 8408-E8E (IBM	3.00
GP61467D - Servicing the IBM POWER8 8408-E8E and	3.00
GP61475 - Operating the ServerLIFT SL-350X and th	3.50
GP61489B - Servicing the IBM POWER8 8335-GCA and	2.50
GS121571 Certified FlashSystem Administrator tr	40.00
GS20980 - Servicing the IBM XIV Gen 3	1.50
GS40890 Servicing the IBM System Storage DCS3700	1.00
GS40914C - Servicing and Supporting the IBM Storw	3.50
GS40922 - Servicing the IBM ProtecTIER TS7650(g)	1.00
GS41005 - IBM TS7700 R3.0 Update Service Training	1.00
GS41077 - IBM DS8000 R7.1 Update Service Training	1.00
GS41078 - IBM DS8000 R7.2 Update Service Training	1.50
GS41084C - Servicing the IBM FlashSystem 840 and	3.50

Attachment 2 - Training Delivery and Curriculum Listing

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

GS41085B - Servicing IBM FlashSystem 710/810 and	3.50
GS41088 - Servicing and Supporting TS7700 Hydra R	4.00
GS41089 - Servicing the IBM TS4500 Tape Library G	2.50
GS41176 - Servicing and Supporting the IBM Storwi	3.50
GS41243D Installing and Servicing the IBM Flash	3.50
GS41244B Servicing the IBM Storwize V7000 Gen2	3.00
GS41244C Servicing the IBM Storwize V7000 Gen2	3.00
GS41245B Installing and servicing the IBM SAN V	3.00
GS41245C Installing and servicing the IBM SAN V	4.50
GS41252 - Servicing the IBM FlashSystem 900 MT-M	3.50
GS41284 - Servicing the IBM DS8000 R7.3	2.00
GS41287 SAN Volume Controller Concepts	1.00
GS41418B Installing and Servicing the IBM Flash	3.00
GS41418C Installing and servicing the IBM Flash	3.50
GS41421 Installing and Servicing the IBM FlashSys	3.50
GS41421B Installing and Servicing the IBM Flash	6.00
GS41422 - IBM DS8000 R7.4 update service training	3.00
GS41440 - IBM TS7650 Gateway (M/T 3958 - DD6) Ser	1.00
GS41443 IBM TS7700 R3.2 Update Service Training	2.00
GS41452 - IBM DS8000 R7.5 update service training	0.50
GS41508 Servicing the IBM Storwize V7000 Gen1	3.50
GS41513 IBM TS7700 R3.3 Update	1.00
GS41529 - IBM TS7700 R4.0 Service Training	3.00
GS41546 - IBM Storage Appliance 2421-AP1 service	0.50
GS41563 IBM TS4500 R3 Service Training	2.00
GS41567 - IBM DS8880 R8 Service Training	3.25
GS41573-TS4500 3584 (R2) Service Training	3.25
GS61518 Advanced V7K and SAN Volume Controller	3.00
GS61557 Advanced XIV Operational Concepts	6.00
GS61559 An Introduction to the FS900 and V9000	3.50
GTS (GTS) - Selling IBMs POV - Managing Hybrid C	0.50
GTS (GTS) GRACM - CIRATS DB2 (Database) Overview	0.75
GTS (GTS) GRACM - Global Issue Management Procedu	0.75
GTS (GTS) IAM - ITIM/TAMeSSO Overview	1.00
GTS (GTS) IAM - Managing Risk in the User ID Mana	1.00
GTS (GTS) IAM - Password General Security and Req	0.50
GTS (GTS) IAM - Privilege Monitoring Process	0.50
GTS (GTS) IAM - Secondary Controls PAR Process	1.00
GTS (GTS) IAM - Shared User ID Management Educati	0.50
GTS (GTS) SARM - CIRATS DB2 (Database) Noncomplia	0.50
GTS (GTS) SARM - ePolicy Overview	1.00

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

GTS (GTS) SARM Root Cause Analysis Process Versio	1.00
GTS (GTS) SSO - Patch Management Process	1.00
GTS (GTS) SSO Patch Management Process	1.00
GTS (GTS) Systems Consulting Enablement and Train	0.73
How OPAL works with the AS MMF	0.75
IBM 10 Essential Practices for IT Security	0.81
IBM 16-Port EIA 232 LAN-Attached RAN: A Product I	1.00
IBM 2104 Expandable Storage Plus	3.00
IBM 242x System Storage DS8000 Service Training	1.00
IBM 3573 Tape Library Service Training	1.50
IBM 3584 Enhancements - HA1 and 3588-F3A - Servic	1.00
IBM 3584 Tape Library (TS3500) R7A Service Traini	1.00
IBM 3592-E05 Tape Drive Encryption Service Traini	1.00
IBM Acquires Lighthouse Security Group	0.83
IBM Analytics Campus (WW) ARCHITECTS	40.00
IBM BPM V8 Advanced Delta Workshop for BPM Techni	40.00
IBM Brokerage Services, Cloud Matrix Demo, Shadow	1.00
IBM Building Interactive Campaigns 9.x (WBT)	8.00
IBM Care Management 6.0 - Functional and Technica	8.00
IBM Case Foundation (Formerly FileNet BPM) 5.0 -	40.00
IBM Case Foundation 5.2.1 - Component integration	4.00
IBM Case Foundation 5.2.1 - Configure the workflo	12.00
IBM Case Foundation 5.2.1 - Introduction	4.00
IBM Case Foundation 5.2.1 - Maintain the Workflow	8.00
IBM Case Foundation 5.2.1 - Security	2.00
IBM Case Foundation 5.2.1 - Workflow application	8.00
IBM Case Manager 5.2 - Build and Migrate a Soluti	16.00
IBM Case Manager 5.2 - Customize and Extend the F	24.00
IBM Case Manager 5.2 - Integrated Rules	12.00
IBM Case Manager 5.2 - Integrating Case Analytic	12.00
IBM Case Manager 5.2 - Introduction to Case Manag	8.00
IBM Case Manager 5.2 - Security - SPVC	16.00
IBM Case Manager 5.2: Migrating and Deploying Sol	8.00
IBM Case Manager 5.2: Solution Building	24.00
IBM Cloud Orchestrator 2.4 Administration and Ope	32.00
IBM Cognos Insight Analyze and Share Data (V10.1	6.40
IBM Cognos Report Studio: Introduction (V10.1/10.	6.40
IBM Cognos Workspace Advanced: Intermediate (V10.	6.40
IBM Cognos Workspace: Create Workspaces (V10.2.2)	4.00
IBM Commerce FastStart - Sales and Tech Sales	40.00
IBM Content Collector 3.0: Email Collection for P	4.00

Attachment 2 - Training Delivery and Curriculum Listing

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

IBM Content Navigator 2.0.2 - Customize and Exten	24.00
IBM Cúram Child Welfare 6.0.5 Solution: Functiona	4.00
IBM Cúram Express Rules for Developers (Applicati	24.00
IBM Cúram Outcome Management for Business Analyst	12.00
IBM Cúram SPM Platform 6.2: New Features	8.00
IBM Datacap 8.1 - Introduction	16.00
IBM DemandTec Solution Overview: Markdown Optimiz	0.80
IBM Digital Analytics and Marketing Center On-Dem	8.00
IBM Digital Analytics Product Overview (course co	8.00
IBM DS4000 EXP810 Storage Expansion Enclosure Ser	1.00
IBM DS8870 Release 7.0 Service Update Training	3.00
IBM eDiscovery Core Skills 2.1.1	8.00
IBM Explorer for z/OS	2.00
IBM FAStT Problem Determination	1.50
IBM FileNet Content Manager 5.2 - Implementation	40.00
IBM Global Account SCCD Change Management Trainin	5.00
IBM Global Account SCCD Incident Management Train	2.00
IBM Global Account SCCD Overview Training	1.00
IBM Global Account SCCD Problem Management Traini	2.00
IBM Global Solution Delivery Framework	2.00
IBM i System Administration Fundamentals	5.00
IBM i2 iBase Intellishare	6.40
IBM i2 Intelligence Portal Essentials	6.40
IBM i2 Overview	2.40
IBM InfoSphere DataStage engine Administration fo	8.00
IBM InfoSphere DataStage Essentials (v11.5) - SPV	32.00
IBM InfoSphere DataStage Essentials V9.1 - SPVC	32.00
IBM InfoSphere DataStage v11.5 - Advanced Data Pr	16.00
IBM InfoSphere FastTrack Essentials V9.1 - SPVC	8.00
IBM InfoSphere Identity Insight Essentials V8 (SP	32.00
IBM InfoSphere Information Server Adm 9.1	32.00
IBM InfoSphere Information Server Adm 9.1 - SPVC	32.00
IBM InfoSphere MDM Server Service Customization f	16.00
IBM Integration Bus V9 Application Development I	40.00
IBM Introduction to Aspera FASP Technology	1.00
IBM Lexington data center Case study of how to	0.50
IBM Marketing Operations Marketing Operations Con	8.00
IBM MQ V8 System Administration (Using Windows fo	32.00
IBM Netcool Operations Insight 1.3 Implementation	24.00
IBM OpenPages: Core Team Fundamentals	1.60
IBM pSeries Rack Concepts	4.00

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

IBM Rational AppScan Standard Edition	2.50
IBM Security Methods Com Series - Part 1: Consult	0.83
IBM Security Methods Com Series - Part 2: Com Tec	0.75
IBM Security Methods Com Series - Part 3: Securit	0.66
IBM Security Methods Com Series - Part 4: Securit	0.83
IBM Security Methods Com Series - Part 5: Proposa	0.83
IBM Security Methods Com Series - Part 9: Buildin	0.50
IBM Security North America Technical Sales Worksh	40.00
IBM Security Strategy	0.76
IBM Security Systems- IBM Security Directory Inte	32.00
IBM Software Testing Automation Framework (STAF)	3.00
IBM Software Testing Automation with STAX	3.00
IBM SPSS Collaboration and Deployment Services -	6.40
IBM SPSS Decision Management for Customer Interac	8.00
IBM SPSS Modeler Entity Analytics (V15)	1.60
IBM Sterling B2B Integrator Fundamentals	40.00
IBM StoredIQ 7.6 - Core Skills	8.00
IBM Storwize V3500 SAN Volume Controller Overview	2.00
IBM Storwize V5000 Generation 2 Service Training	2.00
IBM System i 9407-515 Hardware Training	2.00
IBM System Networking Switch Center Version 1.1	1.50
IBM Systems x High Performance Problem Determinat	1.00
IBM Tealeaf Customer Experience 9.0.2 Fundamental	8.00
IBM Tivoli Workload Scheduler 8.4 Scheduling and	4.00
IBM TotalStorage FAStT EXP100 Storage Unit	1.00
IBM TS7740 R1.1 / R1.2 Update Service Training	1.00
IBM TS7740 R1.3 & R1.4 Update Service Trainin	1.00
IBM Unica Campaign Introduction 8.5 (SPVC)	24.00
IBM Unified Method Framework for TI Professionals	5.50
IBM Watson Ambassador Program - All IBMers	4.00
IBM WebSphere Application Server V7 Administratio	40.00
IBM WebSphere Application Server V7 Problem Deter	40.00
IBM WebSphere Commerce V7 Foundation	16.00
IBM z13 Service Education	3.50
IBM z13 Service Education (M/T 2964)	4.00
IBM z13s Service Education (M/T 2965)	3.50
IBM zEnterprise BC12 (zBC12) Service Education	2.00
IBM zEnterprise EC12 GA2 Service Education	2.00
Identify and Resolve JES2 Batch Problems	4.00
Identity, Presence, and Privacy	1.50
IMS Database Concepts for COBOL Programmers	4.00

Attachment 2 - Training Delivery and Curriculum Listing

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

	Increasing Your IBM Software Sales	2.00
	Informatica Enterprise Cloud Data Management and	4.00
	Information Server Version 9 Authentication Asses	0.83
	Initializing and Terminating the z/OS System 2.1	4.00
	Innovation and Lifecycle Management - Product Inn	2.00
	Inspections in the Software Lifecycle	3.00
	Integrated Managed Infrastructure (IMI) Cloud and	1.08
	Integrated Managed Infrastructure (IMI)Cloud and	1.50
	Introducing Agile Software Development	2.00
	Introducing Cloud Computing	1.50
	Introducing IBM Cúram Universal Access 6.0.5	4.00
	Introducing IBM Watson Care Manager	8.00
	Introducing the IBM Features on Demand Technology	1.00
	Introduction to AMS for the Chemicals and Petrole	1.00
	Introduction to AMS for the Retail Industry	1.00
	Introduction to Analytical Decision Management (V	16.00
	Introduction to Architectural Thinking	5.00
	Introduction to Big Data & Analytics	0.50
	Introduction to Bluemix	8.00
	Introduction to Development with DOJO	3.00
	Introduction to GUI Test Automation	2.00
	Introduction to IBM Cúram Social Program Manageme	8.00
	Introduction to IBM i for System Operators	5.00
	Introduction to IBM SPSS Modeler and Data Mining	16.00
	Introduction to IBM SPSS Modeler Text Analytics (	16.00
	Introduction to IBM SPSS Statistics (V21) - SPVC	16.00
	Introduction to IBM SPSS Statistics (V22) - SPVC	16.00
	Introduction to IBM WebSphere Commerce Extended S	12.00
	Introduction to IBM WebSphere Commerce Management	2.00
	Introduction to InfoSphere Master Data Management	8.00
	Introduction to Linux	5.00
	Introduction to Marketing Management for IBM WebS	1.00
	Introduction to Organizational Change Management	1.00
	Introduction to Product Catalog for IBM WebSphere	1.00
	Introduction to RDBMSs and DB2 (Database)	3.00
	Introduction to RDBMSs and DB2 (Database) V11	3.00
	Introduction to SAP Business Planning and Consoli	3.00
	Introduction to SAP Solution Manager (SM001)	2.00
	Introduction to Software Program Design	1.50
	Introduction to Software Quality	3.00
	Introduction to Software Testing	2.00

Attachment 2 - Training Delivery and Curriculum Listing

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

Introduction to Statistical Analysis Using IBM SP	16.00
Introduction to Systems Engineering and Architect	3.00
Introduction to the Flex System Manager Node	1.00
Introduction to the Lenovo Flex System Chassis Ma	1.00
Introduction to the REXX (Restructured Extended E	4.00
Introduction to UNIX	2.00
Introduction to VSE	4.00
Introduction to WebSphere Application Server	1.00
IT Optimization	0.75
IT Security for End Users: IT Security Fundamenta	1.00
ITIL Edition Foundation: Service Operation Proce	2.00
ITIL Exam Prep: Questions, Answers & Explanations	1.50
Java Introduction for the IBM Enterprise	3.00
Java Programming for the IBM Enterprise	7.00
Java Programming with Java SE 6.0: Creating Class	3.00
Java Programming with Java SE 6.0: Exception Hand	2.50
Java Programming with Java SE 6.0: Getting Starte	2.00
Java Programming with Java SE 6.0: Java I/O	2.00
Java Programming with Java SE 6.0: Java Utilities	3.50
Java Programming with Java SE 6.0: Operators and	2.50
Java Programming with Java SE 6.0: Working with C	2.75
Java SE 7 New Features - GDA	16.00
Java SE7 Fundamentals: Handling Errors and Deploy	1.00
Java SE7 Fundamentals: Introduction to Java	1.50
Java SE7 Fundamentals: Variables, Operators, and	1.50
JavaScript Essentials: JavaScript In Depth	2.00
JCL (Job Control Language) (z/OS) - Coding Proced	4.00
JCL (Job Control Language) (z/OS) - Identifying a	3.00
JCL (Job Control Language) (z/OS) - Introduction	3.00
JCL (Job Control Language) (z/OS) - Using Special	5.00
JCL (Job Control Language) - Basic VSE Job Contro	4.00
JECL (Job Entry Control Language) Statements	2.00
Junior Level Linux Professional (LPIC-1) Exam 101	1.00
Junior Level LPIC-1 Exam 102: Customize and Use t	2.50
l ESS35920 - IBM 3592-EH7/EH8 Rack-mount Service	1.00
LDAP Fundamentals	3.00
Lenovo XClarity Administrator	5.00
LEP41577 - Servicing the Lenovo Storage D1024 Sin	1.00
LEP71507 - Servicing Lenovo S2200/S3200 Storage E	6.00
Life Cycle Testing	1.00
Linux Hacking	1.00

Attachment 2 - Training Delivery and Curriculum Listing

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

Linux on System z Fundamentals	3.00
Linux Operations	4.00
Linux Shell Programming	4.00
Linux System Maintenance and Hardware Configurati	2.50
Linux System Troubleshooting	2.00
LLSO SPO 01 Course Introduction	0.75
LLSO SPO 02 Client Value Method & IBMs Sales Fra	1.00
LLSO SPO 03 Complex Deals End-to-End	1.00
LLSO SPO 04 Elements of a Winning Strategy	1.00
LLSO SPO 06 Building the Proposal Team	1.00
LLSO SPO 07 Proposal Baselines	1.00
LLSO SPO 08 Solution Definition	2.00
LLSO SPO 10 Technical Management Planning	2.00
LLSO SPO 13 Managing the Proposal Writing Process	0.75
LLSO SPO 14 Getting the Proposal Out the Door	1.75
LLSO SPO 15 Transition to Delivery Best Practic	0.60
Mainframe TCP/IP Commands	5.00
Maintaining Data in Files with the ISPF Editor	7.00
Making Content Dynamic with DHTML	3.00
Manage Data with DB2 (Database) - SQL	3.00
Management Center Integrations for WebSphere Comm	1.00
Management Empowered by mySAP ERP Logistics and O	4.00
Management Empowered by SAP ERP (ERP001)	4.00
Management Self-Assessment of Controls (MSAC) pro	3.00
Managing Agile Software Development	1.50
Managing Data Files and Definitions with ISPF/PDF	4.00
Managing DB2 (Database) Operations	4.00
Managing Resource Utilization in Linux	0.50
Managing Sales Catalogs for IBM WebSphere Commerc	1.00
Manipulating Data in Excel	1.00
Marketing Activities for IBM WebSphere Commerce V	3.00
Marketing with Search for WebSphere Commerce Feat	1.50
Mentoring 1Z0-047 Oracle Database SQL Expert	1.00
Microsoft Azure: Introduction	2.00
Microsoft Azure: Networks and Storage	2.50
Microsoft PowerShell for Windows: Getting Started	2.50
Microsoft SQL Server - Designing Solutions: Windo	2.50
Migrating Infrastructure to the Cloud	1.00
MMS for Mac Offering Education_OI-OO_Solutioner_F	1.66
Mobile Application Development with IBM Worklight	32.00
Mobile Virtualization Services Offering Update_OI	1.30

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

MobileFirst Collaboration Services Offering Updat	0.75
MobileFirst Infrastructure Consulting Services Ed	7.00
Mobility Infrastructure Consulting Services Works	1.36
Mobility Overview for Technical Sales	1.50
Module 5: Steady State - End-of-Use/Lease/Mainten	1.00
MongoDB: Concepts, Installation, and Querying	1.50
Multitool and ECuREP file handling	1.00
MySQL: Using the Data Manipulation and Definition	2.00
N America Guardium Technical Sales Workshop	32.00
NetApp Fibre Channel SAN Troubleshooting	1.66
Network and System Security Mechanisms	2.00
Networking Fundamentals	4.00
New General Ledger Functionality Webinar	1.00
Notes Domino 8.5 Application Development Update	16.00
OKP - SAP GRC Global Trade Services 8.0 (OGT80S)	34.36
Oracle 11i Order to Cash Fundamentals Express Gui	37.50
Oracle Database 11g Release 2: Database Architect	2.00
Oracle Database 11g: Administration Workshop I Re	40.00
Oracle Database 11g: High Availability - GDA	32.00
Oracle Database 12c New Features	2.00
Oracle Enterprise Manager Cloud Control 12c: Mana	24.00
Oracle Enterprise Manager Cloud Control 12c: Over	24.00
Oracle Fusion Middleware: An Overview	0.58
Oracle Retail Merchandising System New Features W	2.00
Oracle Retail Merchandising System R14 New Featur	2.00
Oracle WebLogic Server 11g: Monitor and Tune Perf	24.00
OS/390 UNIX Customization and Administration	12.00
Overview of IBM Cognos BI (V10.2.2)	8.00
Overview of IBM Run SAP	1.00
Overview of IBM SAP Next Generation Tools	0.50
Overview of Java Security	1.00
Overview of SAP Solutions	2.00
Overview of Security Engineering	2.00
Overview of Software Development Practices	5.00
Overview of the tools employed in international e	1.25
Parallel Sysplex	3.00
Performing Calculations Using Functions in Excel	1.00
Performing Licensed Internal Code Maintenance	3.00
Planning an Agile Software Development Project	2.00
Portable Storage Media (PSM) Compliance Metrics	1.00
Portable Storage Media (PSM) for Practitioners	0.70

Attachment 2 - Training Delivery and Curriculum Listing

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

Predictive Modeling with IBM SPSS Modeler - SPVC	24.00
Presenting Data in Tables and Charts in Excel	1.00
Presenting Data using Conditional Formatting and	1.00
Pricing Management for WebSphere Commerce V7 Feat	2.00
Privacy Essentials for Applications and Business	1.00
Procedure Training - Action Management	0.75
Procedure Training - Change Management	0.75
Procedure Training - Compliance Incident Manageme	0.75
Procedure Training - Configuration Management	0.75
Procedure Training - Continuous Risk Management	0.75
Procedure Training - Defect Management	0.75
Procedure Training - Deliverables Release and Acc	0.75
Procedure Training - Estimating	0.75
Procedure Training - Issue Management	0.75
Procedure Training - Key Decisions	0.75
Procedure Training - Organizational Measurement a	0.75
Procedure Training - Organizational Training Prog	0.75
Procedure Training - P3 - Process, Performance an	0.75
Procedure Training - Policy or Process Exception	0.75
Procedure Training - Problem Management	0.75
Procedure Training - Process Assurance Management	0.75
Procedure Training - Process Assurance Review	0.75
Procedure Training - Product Integration	0.75
Procedure Training - Project Planning	0.75
Procedure Training - Quality Planning	0.75
Procedure Training - Requirements Development and	0.75
Procedure Training - Root Cause Analysis	0.75
Procedure Training - Service Request Management	0.75
Procedure Training - Supplier Management	0.75
Procedure Training - Technical Solution	0.75
Procedure Training - Work Classification	0.75
Procedure Training - Work Product Inspection	0.75
Process Discovery and Modeling in IBM Blueworks L	4.80
Process Implementing Bus Process Mgr Std V8.5 - I	40.00
Process Implementing Bus Process Mrg Std V8.5.5 -	40.00
Process Innovation and Business Process Managemen	1.00
Procurement Cloud, Analytics, Mobile, Social, Sec	0.50
Product and Category Search Optimization for IBM	1.50
Product Information Management for IBM WebSphere	2.50
Project zEUS / Future of z (Dot Alexander)- Syste	1.08
Proventia Server Intrusion Prevention System (2.0	4.00

Attachment 2 - Training Delivery and Curriculum Listing

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

Providing Cloud Security	1.50
pSeries 615 Models 6C3 and 6E3 (M/T 7029) and 911	2.00
PureApplication Systems Solution Firmware Mainten	1.00
PureApplication Systems Solution Installation Wiz	1.00
PureApplication Systems Solution Overview	1.50
PureApplication Systems Solution Problem Determin	1.00
Python Language Basics	2.50
RACF for System Administrators and Auditors	4.00
Requirements Analysis and Modeling for Test	3.00
Resolving Windows 7 Network Connectivity Issues	2.00
Retail Merchandising System R14 New Features Webi	2.00
Retire and Dispose Assets	1.00
Reviewing and Protecting Content in Excel	1.00
REXX (Restructured Extended Executor) Built-In Fu	6.00
REXX (Restructured Extended Executor) Keyword Ins	6.00
REXX (Restructured Extended Executor) with z/OS a	6.00
RS/6000 7017 Enterprise Server S Models Hardware	4.00
Running the TFTP Burn Recovery Procedure	1.00
SAP - WM Advanced e-Learning conversion & Upgrade	24.00
SAP Administration (SkillSoft)	2.00
SAP BusinessObjects: Business Intelligence	1.00
SAP Enterprise Resource Planning (ERP)	2.50
SAP Logistics Modules	3.00
SAP Material Management Overview (ERP400)	2.00
SAP OKP - OKP SAP High-Performance Analytic Appli	43.00
SAP OKP: SAP NetWeaver Business Intelligence (BW0	5.00
SAP OKP: SAP Paybacks and Chargebacks application	4.00
SAP OKP: SAP Price and Margin Management (PMM) by	2.00
SAP Solution Manager- Global Rollout (SM510)	4.00
SAP Treasury & Risk Management : Overview	8.00
SARM1716 - Customer Threat & Risk Management	1.00
SARM1721 - Supporting Security Compliance	1.00
Saving and Printing Data in Excel	1.00
SCM iLog Inventory Analyst	1.00
SDSF Concepts and Operation	8.00
SE0MCSPA - Microcode Support Services for AIX Pow	20.00
SE181803 IBM Storage System DCS3700 M/T 1818 80C/	1.00
SE209800 - IBM System z10 BC Service Education	3.00
SE214500 IBM SAN Volume Controller Service Traini	4.00
SE246200, IBM WebSphere DataPower Integration A	6.00
SE2499D1 IBM 2499 Fibre channel Director Family	3.00

Attachment 2 - Training Delivery and Curriculum Listing

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

SE281000 IBM 2810/2812 Field Update Education	1.50
SE281001 IBM XIV (R10.2.4) Field Update Education	1.00
SE281002 - IBM XIV (Gen 3) Service Update Trainin	1.00
SE281003 IBM XIV (R3.1/R11.1) Service Update Trai	1.00
SE281700, Course: System zEnterprise 196 Service	4.00
SE395703 -IBM TS7700 R1.6 Update Service Training	1.00
SE395801 - IBM TS7680 (M/T 3958-DE2) Service Trai	2.00
SE620001 Storage Area Network and Fibre Channel F	3.00
Secure Engineering Basics	3.00
Security and Privacy Methodology Web Lecture: Leg	0.83
Security And Risk Management IAM Logical Security	1.00
Security Engineering as a Process	3.00
Security Essentials: Detect Threats with Security	0.50
Security Essentials: IBM Security Strategy	0.50
Security Essentials: Identify and Protect your Cr	0.50
Security Essentials: Manage and Secure Endpoints	0.50
Security Essentials: Manage Application Security	0.50
Security Essentials: Manage Users and their Acces	0.50
Security Essentials: Market Perspective IBM Sec	0.50
Security Essentials: Protect Against Targeted Thr	0.50
Security Essentials: Protect Against Web Fraud	0.50
Security Essentials: Protect the Mobile Enterpris	0.50
Security Essentials: SaaS Solutions	0.50
Security Essentials: Secure the Cloud	0.50
Security Essentials: Security Sales Call to Actio	0.50
Security Essentials: Security Services	0.50
Security for z Systems	1.00
Security Methods Communication Series Part 10: IB	0.50
Security Programs - Suspicious Package Recognitio	1.00
Security Requirements and Misuse Cases for Tester	4.00
Security requirements for administrators	0.75
SEDOTCM0 - NetApp Basic Fundamentals of Data ONTA	0.50
SEDS5001 IBM DS5000 M/T 1818 Storage Enhancements	1.00
SEFOMB00 - NetApp Fundamentals of Motherboard Rep	2.00
Selling and Positioning AppleCare for Enterprise	0.50
Selling and Positioning Integrated Multi-Vendor S	0.50
Selling and Positioning TSS for MTSS Lifecycle Ma	0.50
Selling and Positioning TSS MMS Alliance Riverbed	0.50
Selling and Positioning TSS MVS Managed Vendor Su	0.50
Selling and Positioning TSS MVSS ATM & Branch	0.50
Service Education for Base and Proprietary Servic	2.50

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

	Servicing the 520 Hardware	3.00
	Servicing the 7031 D24 & T24 Hardware	3.00
	Servicing the 7042-CR4. 7042-C06 and 7042-C08 Har	3.00
	Servicing the Hardware Management Console for POW	3.00
	Servicing the IBM 5594 (Rack) and 5595 (Tower) UP	1.50
	Servicing the IBM BladeCenter S	1.50
	Servicing the IBM eServer i5 and eServer p5	6.00
	Servicing the IBM Flex Storage Expansion Node	1.00
	Servicing the IBM Flex System p260 and p460 Compu	0.50
	Servicing the IBM HX5 Blade Server and MAX5 Expan	2.00
	Servicing the IBM PureData System for Analytics/N	1.00
	Servicing the IBM PureScale Application System So	2.50
	Servicing the IBM System Networking Rackswitch G8	0.75
	Servicing the IBM System p Supporting POWER6 Tech	40.00
	Servicing the IBM System x 3850 X5 and x3950 X5 M	2.00
	Servicing the IBM System x iDataPlex	5.00
	Servicing the IBM System x3200	1.00
	Servicing the IBM System x3850 M2	1.50
	Servicing the IBM System x3850 X6 and x3950 X6	2.50
	Servicing the IBM x3530 M4 Type 7160 and x3630 M4	1.00
	Servicing the IBM x3550 M4 Type 7914, x3650 M4 Ty	1.50
	Servicing the Lenovo Flex System SI4091 10-Gb Sys	1.00
	Servicing the Lenovo Intelligent Cluster 14B	2.00
	Servicing the Lenovo Networking RackSwitch G827	1.00
	Servicing the Lenovo x3550 M5 and x3650 M5 machin	2.50
	Servicing the Model 505 Hardware	3.00
	Servicing the Model 510 and 710 Hardware	3.50
	SESONAS1 - IBM Scale Out Network Attached Storage	6.50
	Seterus Assessment for - Red Flags Policy - A Gui	1.00
	SETS7650 IBM TS7650G Gateway Service Training	1.00
	SharePoint Online	1.00
	Sharing and Linking Data, and Adding Office Apps	0.50
	SIH East Training CCS Client Center Offering_OI-O	0.80
	SIH East Training CCS Powered by Watson_OI Educat	0.73
	Social Engineering: Recognition and Defense	0.50
	Software Quote and Order (SQO) Tool	0.75
	Software Selling Tools	1.00
	Software Test Management	2.00
	Solutions Powered by SAP SAP130	2.00
	Spring Framework	6.00
	SPWR6AG1- IBM System p 9125-F2A (IH) Hardware Tra	4.00

Attachment 2 - Training Delivery and Curriculum Listing

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

SPWR6AJ1 - 9407-M15 and 9408-M25 IBM Power 520 Ha	4.00
SPWR6AN1 - 8203-E4A, 9407-M15, and 9408-M25 IBM P	3.00
SPWR6AP1- Course: 8204-E8A and 9409-M50 IBM Power	3.00
SPWR6AR1 - IBM Power Systems 19- and 24-Inch PCI-	3.00
SPWR6AS1 - IBM Power Systems CEC Concurrent Maint	3.00
SPWR71U2 - IBM POWER7 7216-1U2 Hardware Training	3.00
SPWR76R6 - Systems Management Director Console	4.00
SPWR7887 - IBM FC 5887 Media Drawer	2.00
SPWR7AA1 - IBM POWER7 8233-E8B and 8236-E8C Hardw	3.00
SPWR7AB1 - IBM POWER7 9117-MMB, 9179-MHB, 9117-MM	3.00
SPWR7CHM - IBM CEC Hot Add/Repair Maintenance for	1.00
SPWR7CR6 - Servicing the 7042-CR6 Hardware Manage	3.00
SPWR7E2B - IBM POWER7 8231-E2B, 8231-E1C and 8231	3.00
SQL Server Overview	3.41
SSAP Delivery Lifecycle for Project Managers - In	1.00
SSR Requirements and responsibilities for hardwar	3.50
Starting and Succeeding with BPM	1.60
Static Code Analysis	3.00
Sterling New Version Enablement - 9.4 Features	7.50
Sterling Selling & Fulfill Foundation Basics of I	2.00
Sterling Selling & Fulfill Foundation Item & Pric	1.00
Sterling Selling & Fulfill Foundation Managing Re	2.50
Sterling Selling & Fulfill Foundation Process Mod	2.00
STG Dev & Mfg Fixed Assets Property Control Educa	0.75
Storage Fundamentals for Data Centers	5.00
Storage Life-Cycle Management Strategy	0.50
StrongLoop Enablement Deep Dive Bootcamp	32.00
Supply Chain Management (SCM) Methods Fundamental	1.50
Supporting IBM System x Tape Products	4.00
System z9 Enterprise Class (z9-EC) Service Educat	2.00
T9353LVC - Virtual Linux Training	36.00
Technical Introduction to IBM WebSphere DataPower	2.40
Technical Leader Launchpad	10.00
Test Design	3.00
Test Levels and Activities	2.00
Testing Throughout the Software Life Cycle	2.00
TestPrep ITIL V3 Foundation (ITV3F)	1.00
The Linux File System	5.00
The Value and Differentiation of IBM z Systems	8.00
The z/OS Management Facility	4.00
Time Sharing Option (TSO)	4.00

Attachment 2 - Training Delivery and Curriculum Listing

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

TOGAF 9 Certification Training	32.00
Tool Support in Software Testing	1.50
Transformative Solutions Using Dynamic Hybrid Clo	1.00
Troubleshooting IBM BladeCenter	5.00
Understanding Attacks	3.00
UNIX Fundamentals: Overview	1.50
UNIX Fundamentals: Shell Scripting Basics	2.00
Update to the Data Center Contamination Guideline	0.50
Using IBM OpenPages (V6.0)	2.40
Using Online System Facilities - TSO/ISPF	4.00
Using PivotTables, PivotCharts, and Advanced Char	1.00
Using Queue Replication - Web Based	32.00
Using SDSF to Control Job Processing	7.00
Using the IBM Dump Decoder	2.00
Using the Store Management Tool for IBM WebSphere	1.00
Using Workload Pricer Communicator!	3.50
Value Realization: Introduction	1.00
VM (Virtual Machines) Concepts and Facilities	8.00
VM (Virtual Machines)/ESA (Email Security Applian	2.00
VMware vSphere 5 - Part 1: Introduction to Virtua	2.00
VMware vSphere 5 - Part 2: High Availability and	2.50
VMware vSphere 5 - Part 2: Logging and Performanc	3.00
VMware vSphere 5 - Part 2: Upgrading Hosts and Vi	2.00
VMware vSphere 6 Install Part 1: Storage and VMs	2.00
VMware vSphere 6 Install Part 1: vSphere Installa	1.50
VSAM Utilities	4.00
Watson Ambassador - Client-facing IBMers	4.00
Watson Analytics evangelist class	32.00
WBT: IT Infrastructure Library (ITIL) Foundations	10.00
WebSphere Application Server V8 Adm Linux	40.00
WebSphere Application Server V8 Adm Windows	40.00
WebSphere Application Server V8 Overview	4.00
WebSphere Application Server V8.5.5 Performance T	28.00
WebSphere Message Broker Basics	1.00
What Every IBMer Needs to Know About SaaS	1.00
Working with Contacts in Outlook	1.00
Workload Transform Analysis for Cloud: Overview	0.50
Workload Transform Analysis for Cloud: Practition	1.00
XW5237 - Servicing the IBM BNT Rackswitch G8000,	2.00
XW5246 -Servicing the IBM Type 7199	1.00
XW5264 - Introduction to the Chassis Management M	1.00

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

	XW5272 - Servicing the IBM Type 7198	1.00
	z/OS Architecture 2.1	4.00
	z/OS Concepts and Components 2.1	5.00
	z/OS Systems Programming Fundamentals 2.1	6.00
	z/VM Concepts, System Initialization and Shutdown	6.00
	zEnterprise System 114 Service Education	6.00
	zEnterprise zEC12 Service Education Course	6.00
	zSeries 900 (M/T 2064) CMOS Servers Maintenance T	8.00
Management Skills	Accessibility for Project Managers	1.00
	ACIS Overview Simulations	1.00
	Adopting an Agile Approach to Project Management	2.00
	Advanced Contract Financial Management: Follow th	0.50
	Advanced Contract Financial Management: Using lab	0.50
	Agile Planning: Doing Estimates and Completing th	2.00
	Agile Planning: Project Initiating and Requiremen	1.50
	Agile Project Management Essentials	2.00
	Agile Project Management Leadership and Behaviors	2.00
	Applied Organizational Change Management (Better	6.00
	Becoming an Inclusive IBM Leader	0.75
	Building Relationships & Influence Course	1.00
	Business Execution: Crafting a Business Strategy	1.00
	Business Planning Essentials: Performing Key Anal	1.00
	Business Planning Essentials: Preparing for Imple	1.00
	Change Management for Projects - Just in Time	6.00
	Change Management for Transformation	1.00
	Change Management, Problem Management, & Root Cau	2.00
	Closing Projects - Just in Time	5.00
	Communicating Effectively with Project Stakeholde	0.50
	Communications Planning	6.00
	Conflict Resolution and Dealing with Challenging	1.50
	Consulting Capability: CRM for E2E	2.00
	CONSULTING FUNDAMENTALS IMPROVE YOUR SKILLS IN	2.00
	Consulting Fundamentals - Building Strategic Rela	1.50
	Consulting Fundamentals - Building Your Eminence	2.00
	Consulting Fundamentals - Developing and Interpre	2.00
	Consulting Fundamentals - Effective Communication	2.00
	Consulting Fundamentals - Facilitation Skills	2.00
	Consulting Fundamentals - Handling Challenging Si	2.00
	Consulting Fundamentals - Identifying Opportuniti	2.00
	Consulting Fundamentals - Issue Based Consulting	2.00
	Consulting Fundamentals - Presentation Skills	2.00

Attachment 2 - Training Delivery and Curriculum Listing

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

Contracting for Project Managers - Self Paced	16.00
Control Project Communications - Based on the PMB	1.00
Controlling Changes and Closing a Project - Based	1.00
Controlling Project Costs - Based on the PMBOK F	1.50
Core Consulting: Global Blue Consulting - elearni	8.00
Core PMI Values and Ethical Standards	2.00
Creating and Tailoring Project Management Systems	4.00
Creating the Work Breakdown Structure - Based on	1.50
Creating Value with Innovation Agendas	1.00
Creative Problem Solving & Effective Thinking Sim	1.00
Critical Thinking Essentials: What Is Critical Th	1.00
Customer Service Confrontation and Conflict	1.00
Customer Service Fundamentals: Building Rapport i	1.00
Decision Making: The Fundamentals	1.00
Defining and Sequencing Project Activities - Base	2.00
Deliver the promise - Experienced Technical Leade	8.00
Developing and Controlling the Project Schedule -	2.00
Developing Emotional Intelligence Skills to Deepe	1.50
Developing Strategic Peer Relationships in Your O	1.00
Developing the Capacity to Think Strategically	1.00
Developing the Right Attitude for Performing unde	1.00
Direct, Monitor, and Control Project Work - Based	1.50
Effective Relationships with Customers	2.00
Elements of a Cohesive Team	1.00
Engagement and Motivation	0.50
Estimating Activity Resources and Durations - Bas	2.00
Estimating Best Practices Overview	1.50
Expert Consulting Skills - Working in a Global Te	3.00
Financial Management for Project Managers - Distr	16.00
Foundation to Experienced Consulting	1.00
Fundamentals of Globalization: Managing in a Glob	1.00
Getting Oriented for Managers - Essentials to Lea	2.00
Getting Results without Authority: Building Relat	1.00
Getting Started Using IBM Rational Portfolio Mana	3.00
Global Business Services Business Requirements De	1.00
Governance and Escalation	3.50
GTS Global Server Build Process	1.50
How to design and facilitate workshops to engage	0.75
HR Transformation: Module 2 - HR Business Case an	1.00
IBM Global Services Worldwide Quality Assurance P	2.00
IBM Program Work Center Basic User Training	6.00

Attachment 2 - Training Delivery and Curriculum Listing

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

IBM Program Work Center Program Administrator Tra	6.00
Identifying Project Risks - Based on the PMBOK F	1.50
Improving Client Satisfaction	1.00
Innov8 Project Management	1.00
Integrated Initiation and Planning - Based on the	2.00
Integrated Project Planning & Forecasting (Integr	1.00
Integrated project planning Delivery Start/7Keys	1.00
Integrated project planning Forecasting/Task Mana	1.00
Interest-Based Negotiation	1.50
Introduction to Managing Agile Projects at IBM	4.00
Introduction to PE Role & Responsibilities	8.00
Introduction to Program Management	1.50
Introduction to Project	1.00
Introduction to Project Management using Project	1.00
Introduction to the DPE Job Role	1.00
Issue-Based Consulting	1.50
IT Project Management Essentials: Introduction to	1.00
IT Project Management Essentials: Testing Deliver	1.00
Leadership Essentials: Building Your Influence as	1.00
Leadership Essentials: Creating Your Own Leadersh	1.00
Leadership Essentials: Leading Innovation	1.00
Leading Teams: Dealing with Conflict	1.00
Leading Teams: Developing the Team and its Cultur	1.00
Leading Teams: Launching a Successful Team	1.00
Managing Accounts in Today's Global Environment	1.60
Managing and Controlling Stakeholder Engagement -	1.50
Managing Difficult Stakeholders	0.50
Managing Employee Relations RisksFor IBM Manager	1.00
Managing Escalations	0.50
Managing Procurements - Based on the PMBOK Fifth	2.00
Managing Project Human Resources - Based on the P	2.00
Managing Projects and Programs (MP&P) Validation	2.00
Managing Projects within Organizations - Based on	2.00
MD 101 - Essentials to Lead	3.00
MD 103 - Advancing your Management Effectiveness	10.00
MicroInequities: The Power of Small (Workplace an	1.00
Module 2. Getting Started with Super Dev Mode Glo	0.75
Monitoring and Controlling Project Scope - Based	1.50
Monitoring, Controlling, and Closing Programs	2.00
Negotiation	0.50
Networking	0.50

Attachment 2 - Training Delivery and Curriculum Listing

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

Online Overview of Project Management in Global B	4.00
Overview of the Scrum Development Process	2.00
PE Finance Education eLearning	1.00
Performing A Quality Assurance Project Management	8.00
Performing Risk Analysis - Based on the PMBOK Fi	1.00
Plan and Manage Project Communications - Based on	2.00
Plan Quality Management - Based on the PMBOK Fif	2.00
Planning Agile Project Releases and Iterations	2.00
Planning Project Costs - Based on the PMBOK Fift	2.00
Planning Project Human Resources - Based on the P	2.00
Planning Project Procurement Management - Based o	1.00
PM203-US Scope and Change Management	1.00
PM204-US Managing to a Project Plan - how to leve	1.00
Practical Estimating Lifecycle: A Fundamental Bus	6.00
Practical Guidance for IBM Unified Method Framewo	3.25
Preparing A Detailed Estimate For Projects	3.00
Process Management for DPEs	1.00
Process, Methods, and Tools Foundation	3.00
Program Life Cycle and Benefits Management	2.00
Program Management for DPEs	1.00
Project and Program Management Annual Update	3.00
Project Management - Agile Learning Suite	1.00
Project Management - Cloud Computing Learning Sui	1.00
Project Management - Social Projects Learning Sui	1.00
Project Management Assessment	0.50
Project Management Basics - Scope management on G	2.00
Project Management Basics - Seven Keys to Success	2.00
Project Management Basics - Understanding plannin	2.00
Project Management Basics: Understanding Project	2.00
Project Management Orientation	16.00
Project Management Overview - Based on the PMBOK	1.50
Project Management Principles e-Learning	4.00
Project Management Process Groups - Based on the	2.00
Project Management Review	2.00
Project Quality Management	6.00
Project Quality Theory and Application	4.00
Project Requirements and Defining Scope - Based o	2.00
Project Risk Management	6.00
Project Risk Management Case Study	6.00
Project Stakeholder Management - Based on the PMB	1.50
QA Fundamentals in Services Solution Design	8.00

Attachment 2 - Training Delivery and Curriculum Listing

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

	Quality Assurance and Quality Control - Based on	2.00
	Release Management	1.00
	Response and Lead Management - Performance Market	1.00
	Risk Management Planning - Based on the PMBOK Fi	1.50
	Risk Response and Control - Based on the PMBOK F	1.00
	Services Proposal Statement of Work Development	8.00
	Strategic Account Governance for IBM Account Team	0.50
	Strategy Bootcamp	1.50
	Successful Client Management	1.00
	Taking Control of Existing Projects - Just in Tim	5.00
	The Coaching Skillset	3.00
	The Voice of Leadership: The Power of Leadership	1.00
	Using PMPMG to Assess and Improve Project Managem	1.50
	Using the GS Risk Tool to Manage Project Risk - J	3.00
	Virtual Communication Skills	1.50
	Virtual Overview of Project Management in Global	14.00
	What Knowledge-Centered Support (KCS) means to In	0.50

TRAINING PROPOSAL FOR

Stryker Corporation, Stryker Neurovascular Division
17-0879

Panel Meeting Date:	1/24/2018
Regional Office:	San Francisco Bay Area Regional Office
Analyst Name:	Robert Jackson
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:		$324,000.00	
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$324,000.00	N/A	$0.00	$472,988.00

APPLICANT PROFILE

Company Summary	Stryker Neurovascular Division, a subsidiary of Stryker Corporation (Stryker) (www.stryker.com), is a medical device manufacturer that custom designs, makes, and supports its products such as catheters, sheaths, coils, stents and guide wires.

Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	**State:** 780	**US:** 980	**World Wide:** 32,000
Turnover Rate (Applicant)	10.20 %		
Repeat Contractor	Yes		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

| Training Objective(s) | Training will improve production skills used in manufacting new products and to meet continuous improvement goals.

Additionally, the Company has recently purchased new software (Oracle,Endora, ERP systems, Salesforce, WorkDay and Agile) and medical device manufacturing equipment estimated to cost $2.5 million, which requires additional training to upgrade staff 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	Retrainee	282	$18.00	60	$1,080	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1941 and headquartered in Fremont, Stryker custom designs, makes, and supports products such as catheters, sheaths, coils, stents and guide wires, which support medical professionals focused primarily in the stroke care market. Stryker's customers include medical groups, hospitals, surgeons, and health care professionals that treat stroke patients.

Only the Fremont facility will participate in training.

2. Current Training Project Details

Purpose of Training	This is Stryker's 4th ETP proposal, and the first in the last five years. Training will upgrade workers' skills to:
	- meet/exceed ISO13485 and rigerous Food and Drug Administration requirements - upgrade Business Skills for Marketing staff - improve product quality, efficiency and resolve product shortages - improve the use of equipment and prevent or respond to problems that occur in manufacturing processes. Training in Computer Skills will be offered to all occupations to successfully manage the implementation of the new global enterprise resource planning (ERP) system. The ERP will be launched in second quarter of 2018. Continuous Improvement will be offered to all trainees to learn best practices, teambuilding and identify ways to improve product quality and resolve product shortages and reduce unanticipated increases in prices. Lean Manufacturing and its related components (such as Six Sigma) is anticipated by Stryker to lead to reduced costs, improved efficiency and increased productivity. Business Skills will be offered to all trainees to identify and learn about new products and develop skills to expand marketing strategies or provide improved customer service. Topics such as Global Marketing, New Product Updates and Business and Report Writing are proposed. Manufacturing Skills will be offered to Technicians and Production Staff to improve the use of equipment and prevent or respond to problems that occur in the manufacturing processes. Topics such as Medical devices, Material Handling and Clean Room are proposed.

PROPOSED TRAINING PROJECT DETAILS

Training Infrastructure and Administrative Plan	Stryker's HR Administrator will oversee all administration. The Company retained California Training Administration, Inc. to assist with project management. Stryker has an annual California budget of $320,000 for new hire orientations, temporary workers training, compliance training, health and safety training, and basic computer skills. ETP training is supplemental and will not displace the company's current commitment to training.
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/E-learning**
Summary	
All occupations will receive Business, Continuous Improvement, Computer and Manufacturing Skills. All proposed types of training except Manufacturing have some E-learning topics. Training will be delivered by in-house experts and vendors. Nine Computer Skills courses will be delivered as Advanced Technology using a combination of vendors and in-house trainers.	

Delivery Method/Level	**Computer Based Training (CBT)**
Summary	
Some coursework will be delivered as CBT as shown in Attachment 2. No more than 50% of training hours per trainee may be delivered via CBT up to 50 hours.	

4. Additional Company or Training Project Details

Advanced Technology (AT)

AT topics are for highly technical professionals such as Engineers, Scientists, IT Staff and Project Managers. Training consists of nine courses in high level software computer applications under Computer Skills and will be delivered by a mixture of vendors (i.e. Minitab) and in-house trainers. Stryker requests the AT reimbursement rate ($26 for priority industries). Due to the complex nature of the material, training must be delivered in small classes with 10 or fewer to allow in-depth coverage and personal attention from the instructor. The estimated cost per trainee in AT is higher when considering the wages of the persons in the training calculated as in-kind, the higher costs of vendors for technical training, and with consideration of the AT trainer-to-trainee ratio.

PROPOSED TRAINING PROJECT DETAILS

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

Stryker has retained the services of the following Subcontractors.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	California Training Administration, Inc. (CTA)	Rocklin	$ 2,500.00
Administrative	CTA	Rocklin	13% of payment earned
Training	Franklin Covey	San Jose	Business Skills
	Effective Training Associates	San Jose	Continuous Imp.
	Minitab, Inc.	San Jose	Computer Skills
	Lynda.com	Carpinteria	Computer Skills

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.

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	**Planned Course Offerings**
Business Skills	BRAIN Training
	Business and Report Writing
	Global Marketing
	Knowledge Transfer - New Product Updates
	Managing Projects
	Marketing / Sales of Surgical Products
	Material Management / Supply Chain
	Negotiation Skills / Influencing Others
	Neuro Anatomy
	Risk Management and Assessment
	Strategic Planning
	Stryker Partner Training
	Stryker Product Training
	Support Skills - Customer, Supplier, Sales
	Technical Presentation Skills
	Technical Product Support
Computer Skills (Advanced Technology)	Agile Product Life Management
	Bio Technical Product Design
	Configuration Management
	Document Control System
	Endora System
	Navigation Software Design
	Oracle System
	SAP (Design & Implementation)
	Stryker Manufacturing Computer System
Computer Skills (Standard)	Agile Software
	Computer Programming
	Endora Computer system
	Kaplan / Compliance Wire
	Lab NoteBook
	LearnLive System
	Manufacturing Computer System
	MicroSoft Office Tools (Intrem./Adv only)
	Mini-Tab (statistics)
	Navigation Software
	Product Life Management System
	SalesForce.com
	SAP / ERP / Oracle Tools

Attachment 2 - Training Delivery and Curriculum Listing

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

	Simulation Tools
	Software Development
	System Configuration
	WorkDay System
Continuous Improvement Skills	Academy of Informed Leaders
	AdvaMed Process
	APICS CPIM - Supply Chain Management
	Certified Assessor Course
	Clinical Good Mnfg Practices
	Change Control Procedures
	Efficiency and Workflow
	General Leadership-Coaching, Feedback, Performance
	High Performance Work Teams
	Interview Gallup SSP Training
	Lean Academy
	Patient Privacy Act Process
	Product Quality Review Teams
	Productivity Improvement
	QMS-Quality Management System / ISO13458
	Quality Awareness / Quality Management
	Risk Management
	Service Contract Process
	Six Sigma
	Team Meeting / Problem Solving
	Workmanship Standards
	Workplace Communications
	Zero Defect / Kaizen / Lean
Manufacturing Skills (ME) (Standard)	CleanRoom
	Digital Imaging
	Document Revisions
	Manufacturing Equipment (Maintenance / Operation)
	Medical Devices
	Micro Powered Instruments
	Power Vehicle Training (Forklift)
	Production Floor Training
	Stryker Product Updates
	Surgical Equipment - Documents and Processes
	Testing / Repair / Reliability / Refurbish
	Warehouse / Materials / Packaging
	Workstation Safety

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	E-Learning – Instructor Led/Distance Learning
Training Type (Level)	**Planned Course Offerings**
Business Skills	Managing Projects
	Marketing / Sales of Surgical Products
	Strategic Planning
	Stryker Product Training
	Support Skills - Customer, Supplier, Sales
	Technical Product Support
Computer Skills (Standard)	Agile Software & Tools
	Document Control System
	Endora System & Tools
	Kaplan / ComplianceWire
	Lab NoteBook
	Using Learning Management System
	MicroSoft Office Tools (Interm. / Adv. Only)
	Oracle System & Tools
	Product Life Management System
	SalesForce.com Tools
	SAP Tools and Techniques
	WorkDay System & Tools
Continuous Improvement Skills	Clinical Good Manufacturing Practices
	Lean Academy
	Quality Awareness / Quality Management QMS
	Service Contract Process
	Six Sigma
	Team Meeting / Problem Solving

Delivery Method /Level	E-Learning – Computer Based Training (CBT)	
Training Type (Level)	**Planned Course Offerings**	**Standard Hours**
Business Skills	2014 Q12 Coordinator Cert	1.00
	Admin Support - Assignments CWIRE-SYS02	1.00
	Admin Support Troubleshooting CWIRE-SYS03	1.00
	Advertising & Promotion Requests NV00009257	1.00
	Advertising & Promotional Materials NV00020152	1.00
	Advertising Social Media NV00009690	1.00
	Asset Classification & Control 90260274	1.00
	BCA - Biocompatibility Template 90709350	1.00
	Being Approachable Linda.comBS019	1.00
	Bone Mill Sales Training NSE-0003	1.00
	Brand Refresh Visual Identity CORP-COM-0002	1.00
	Budget MGMT.S00.P04	1.00

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

Business Writing: Know Readers Linda.comBS005		1.00
Capacity to Think Strategically Linda.comBS014		1.00
CE Marking of Medical Devices 90711515		1.00
Change Management ISPCY_CMA_001		1.00
Change Management ISSOP_CMA_001		1.00
Clinical Events Committee Operations 90708413		1.00
Clinical Risk Benefit Analysis 90703988		1.00
Clinical Trial Adverse Events 90711028		1.00
Clinical Trial Complaint Reporting 90708540		1.00
Co-Development Vendor Document 90481907		1.00
Communicating Assertively Linda.comBS020		1.00
Communicating with Confidence Linda.comBS021		1.00
Compensation Administration Tool CORP-FIN-0008		1.00
Confident Public Speaking Linda.comBS033		1.00
Contract Agreement FG Item Creation 90785000		1.00
Corp WI Process FMEA 90453094		1.00
Corp Windchill: Dispositions CORP-RAQA-0007		1.00
Corporate Windchill Disposition CQI-SUP-020-03		1.00
Corporate Windchill: Overview CORP-RAQA-0005		1.00
Creating a Presentation Linda.comBS001		1.00
Customer Consignment Program 90783696		1.00
Customer Notification Letter CQF-PMS-002-05-C		1.00
Customer Service Linda.comBS006		1.00
Customer Service in the Field Linda.comBS008		1.00
Customer Service Order Processing 90785257		1.00
Customer Service over the Phone Linda.comBS009		1.00
Customer Service Relationships Linda.comBS007		1.00
Decision Making: Fundamentals Linda.comBS011		1.00
Decision Making: Tough Decisions Linda.comBS010		1.00
Decision Making: Tools Techniques Linda.comBS012		1.00
Delivering a Presentation Linda.comBS002		1.00
Developing High Performance Org Linda.comBS013		1.00
Developing Strategic Thinking Linda.comBS015		1.00
Distribution Challenge of Packaging 90722964		1.00
ESSx Sales Training NSE-0007		1.00
EU Authorized Representative Agmt 90770687		1.00
European Union RepStock Program NV00012190		1.00
Export Certificate 90711514		1.00
FDA 806 Notification CQF-PMS-002-05-B		1.00
FDA Import Export Requirements 90812748		1.00

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

	FDA Registration and Device Listing CQD-REG-003	1.00
	Finance for Non-Financial Linda.comBS031	1.00
	Financial Disclosure Clinical Invest 90711338	1.00
	Financial Projections FNCE.S00.P08	1.00
	GCP Clinical Trial Monitoring 90711034	1.00
	Generating Creative Ideas Linda.comBS016	1.00
	Gowning and Facility Practices 09-03-00	1.00
	Headcount Management EMPL.S02.P01	1.00
	High Speed Drills Sales Training NSE-0005	1.00
	Human Error Risk Assessment CQG-PDC-028	1.00
	Identification and Labeling MES area 90227125	1.00
	Internal Customer Service Linda.comBS018	1.00
	Introduction of Assets 90711537	1.00
	Knowledge Management NV00023835	1.00
	Leading Emotional Intelligence Linda.comBS025	1.00
	Leading Innovation Linda.comBS024	1.00
	Listening Essentials Linda.comBS022	1.00
	Management of Clinical Study Doc 90703983	1.00
	Managing Experienced Managers Linda.comBS026	1.00
	Managing High Performers Linda.comBS027	1.00
	Managing New Managers Linda.comBS028	1.00
	Managing Projects within Org Linda.comBS029	2.00
	Market Specification 90735245	1.00
	Media and Organism Preparation 90801736	1.00
	Media Interaction CORP-COM-0001	1.00
	Mergers and Acquisitions NV00007509	1.00
	MES and Business Objects Access 90357036	1.00
	MES Glossary of Terms 90216036	1.00
	MES Reporting WI 90181592	1.00
	MES View Documents Procedures 90215078	1.00
	Motivating Employees Linda.comBS030	1.00
	Nasopore Sales Training NSE-0009	1.00
	National Patient Safety Goals	1.00
	NC Ownership Training CAPA-1002	1.00
	Neurovascular International Standards 90138508	1.00
	New Product Introduction Policy 90750459	1.00
	NV-DIV-HR-AMP (9-Box)	1.00
	NV-DIV-HR-AMP (Delegating Tasks to Your Team)	1.00
	NV-DIV-HR-AMP (Leading Productive Meetings)	1.00
	NV-DIV-HR-AMP (New Manager Fundamentals)	1.00

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

	NV-DIV-HR-AMP (Spans and layers)	1.00
	NV-DIV-HR-AMP Objective Setting	1.00
	NV-DIV-iExpense Refresher (Non-reportable HCPs)	1.00
	NV-DIV-iExpense-Manager Refresher	1.00
	NV-DIV-Manager Technical Issues	1.00
	NV-DIV-R&D-eDFU	1.00
	NV-DIV-SALES- RepStock	1.00
	NV-DIV-SALES-Auditing Cust	1.00
	NV-DIV-SALES-Auditing RepStock	1.00
	NV-DIV-SALES-Audits	1.00
	NV-DIV-SALES-Expired Product	1.00
	NV-DIV-SALES-FIMSApp	1.00
	NV-DIV-SALES-Increase and Decrease	1.00
	NV-DIV-SALES-iPad Scanning	1.00
	NV-DIV-SALES-iPadSetupandLogin	1.00
	NV-DIV-SALES-Order Cust Sample	1.00
	NV-DIV-SALES-Overview	1.00
	NV-DIV-SALES-Par Check	1.00
	NV-DIV-SALES-ParLevelDecrease	1.00
	NV-DIV-SALES-ParLevelIncrease	1.00
	NV-DIV-SALES-Process RepStock Sale	1.00
	NV-DIV-SALES-Receiving an Inventory	1.00
	NV-DIV-SALES-RepStock Order Inventory	1.00
	NV-DIV-SALES-RepStock Return	1.00
	NV-DIV-SALES-Request RepStock Sample	1.00
	NV-DIV-SALES-Scanning Cust Inventory	1.00
	NV-DIV-SALES-Video Login and Out	1.00
	NV-DIV-SALES-Workbench Overview	1.00
	NVD-eDFU (Functional Requirements)	1.00
	NVD-eDFU (Production Support Plan)	1.00
	NVD-GQO-Supplier Controls	1.00
	OEM Action CQF-PMS-002-04-B	1.00
	OEM Product Development WI NV00018802	1.00
	Offsite Record Retention Retrieval NV00019287	1.00
	On Label 2017 CORP-CMP-0012 2017	1.00
	Operating Room Conduct PHA68	1.00
	PFA Strategy CQF-PMS-002-05-A	1.00
	Planning a Presentation Linda.comBS003	1.00
	Post Market Data Review 90755654	1.00
	Post Market Health Risk Assessment NV00006967	1.00

Attachment 2 - Training Delivery and Curriculum Listing

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

Potential Investigator Selection NV00004506	1.00
Preclinical Document Roadmap 90778500	1.00
Preclinical Sciences Glossary 90713231	1.00
Premarket Approval Applications NV00022551	1.00
Preparing Effective Speeches Linda.comBS034	1.00
Producing Barcode Artwork WI NV00017235	1.00
Product Approval Matrix WI 90820104	1.00
Product Assessment (PAC) CQI-PMS-001-07	1.00
Product Brand Template and Artwork 90722449	1.00
Product Sales Orders MV-SOP29	1.00
Project Management Linda.comBS032	1.50
Projects within Organization Linda.comBS004	1.50
Protocol Development Process 90711017	1.00
Purchasing Controls 90698402	1.00
Purchasing Procedures 06-01-00	1.00
Regulations Deep Dive CORP-PEC-0003	1.00
Regulatory Assessment of Change 90711520	1.00
Regulatory Strategy Procedure 90711508	1.00
Risk Assessment and Control 90797420	1.00
Risk Assessment, Control 90707418	1.00
Risk Management 90707416	1.00
Risk Management 90797415	1.00
Risk Management Planning Reporting 90707420	1.00
Risk Techniques WI 90797422	1.00
Safeguard Protected Health Info CORP-HR-0004	1.00
Sales Policies & Procedures END-SALES-100	1.00
Salesforce Procedure NV00024081	1.00
Salesperson Territory Alignment NV00016444	1.00
SNV Change Notice Survey Process NV00008482	1.00
SNV Promotional Materials 90663481	1.00
Social Media Playbook CORP-COM-0004	1.00
Sponsor Reporting Requirements 90708404	1.00
Standards Review 90760272	1.00
Strategic Planning MGMT.S00.P01	1.00
Stryker Canada Stryker Design RA25	1.00
Stryker Cork Review NV00010049	1.00
Stryker Customer Order Processing NV00001813	1.00
Stryker EAM Contingency Plan NV00000167	1.00
Stryker NV Configuration Blacklist 90795938	1.00
Stryker NV Transfer NV00000439	1.00

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

	Stryker Pre-clinical Archiving 90776639	1.00
	Stryker Product Field Action 90689164	1.00
	Stryker RA Configuration Management 90795196	1.00
	Stryker Regulated Substances CQI-ENV-001-01	1.00
	Stryker Research Grant Review NV00024029	1.00
	Supplemental PFA Information CQF-PMS-002-04-D	1.00
	Supplied Material First Article 90658983	1.00
	Supplier Change Review 90711503	1.00
	Supplier Change Review MV-SOP56	1.00
	Supplier Management 90658720	1.00
	Supplier Process Control Document 90711527	1.00
	Targeting Your Message Linda.comBS023	1.00
	Technical Writing CORP-CAPA-0004	1.00
	Third Party Inspections 90654334	1.00
	Translation Management Process 90722442	1.00
	Venlo Marketing Status Flag Maint 90711541	1.00
	What is Stryker's Brand CORP-COM-0013-EQ	1.00
	What is Stryker's Brand? CORP-COM-0013	1.00
	WI Creation and Advertising 90666708	1.00
Computer Skills	Accessories Technical Data Files 90711509	1.00
	Advamed CORP-CMP-0013 2017	1.00
	Advanced Customization Excel Linda.comCMP001	2.00
	Advanced Data Mngt Excel Linda.comCMP002	1.50
	Advanced Formatting in Excel Linda.comCMP003	2.00
	Analyzing Data in Excel 2007 Linda.comCMP004	3.50
	Biocompatibility Report Template 90707953	1.00
	Completing and Using a CMA Form 90711545	1.00
	Component Order Entry NV00018809	1.00
	Computer Network Controls MV-SOP04	1.00
	Computerized Systems Inspections DEV59	1.00
	Concentric Medical Quality System MV-TM0001	1.00
	Concur Expense Reporting CORP-ERP-PTP-205	1.00
	Concur P-Card Reporting CORP-ERP-PTP-334	1.00
	Concur Reporting CORP-ERP-PTP-332	1.00
	Corporate Quality Document CQI-SUP-001-04	1.00
	Create and Maintain DFUs NV00002685	1.00
	Create and Maintain eDFU Website NV00015097	1.00
	CTMS - Creating Payments SYK-CTMS-006-PRE	1.00
	CTMS - Creating Site Visits SYK-CTMS-005-PRE	1.00
	CTMS - Creating Sites SYK-CTMS-003-PRE	1.00

Attachment 2 - Training Delivery and Curriculum Listing

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

CTMS - Rollup Information SYK-CTMS-007-PRE	1.00
CTMS - Creating Subjects SYK-CTMS-004-PRE	1.00
CTMS - Products Programs SYK-CTMS-002-PRE	1.00
CTMS - System Overview SYK-CTMS-001-PRE	1.00
Data Governance Change CQF-DGO-001-B	1.00
Data Monitoring Committee Charter NV00003952	1.00
Data Monitoring Committee DMC 90711051	1.00
Data Privacy CORE-0001	1.00
Data Snapshot_Database Lock Check NV00003277	1.00
Database Unlock Authorization Form NV00003276	1.00
Design Dossiers and Technical Files 90711507	1.00
Document Control Process CORP-CQDC-0001	1.00
eDFU Website 1.0.0 User Manual NV00015096	1.00
ERP Distribution Bill To and Ship To 90812129	1.00
ERP Distribution Invoice Limited Rele 90812128	1.00
ERP US Distribution Audits 90751341	1.00
Excel Formulas and Functions Linda.comCMP006	2.00
Excel Pictures Themes Styles Linda.comCMP005	1.50
Exchanging Data with Excel Linda.comCMP007	3.00
External Audit Reports NV00015926	1.00
FG Materials Configuration Management 90789212	1.00
Formatting Worksheets in Excel Linda.comCMP009	3.00
GDP Demantra Access User CORP-GDP-0002	1.00
GDP Demantra Aggregation CORP-GDP-0006	1.00
GDP Demantra Data Sources CORP-GDP-0003	1.00
GDP Demantra FileArchive CORP-GDP-0007	1.00
GDP Demantra Overview CORP-GDP-0001	1.00
GDP Demantra Series CORP-GDP-0004	1.00
GDP Demantra Worksheets CORP-GDP-0005	1.00
GIM Data Maintenance NV00012098	1.00
GIV Basic Navigation Training CORP-GIV-0002	1.00
GIV Fundamentals Training CORP-GIV-0001	1.00
Global Content System	1.00
Global Hold CQI-PMS-006-01	1.00
Global Hold Electronic System CQI-PMS-006-02	1.00
Global Hold Workbook CQF-PMS-006-01-A	1.00
Global Trade Item Number CQP-DGO-004	1.00
Global Travel Policy CORP-FIN-0006	1.00
GxP Computerized Validation CQI-PDC-002-12	1.00
GxP Spreadsheet Validation CQG-PDC-017	1.00

Attachment 2 - Training Delivery and Curriculum Listing

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

	How to Create a Change Notice in PLM 90705655	1.00
	How to Create Documents in PLM 90705648	1.00
	How to Create or Revise Procedure NV00012234	1.00
	How to Create Symbols NV00002341	1.00
	HP ALM - Overview CORP-ERP-015	1.00
	HP ALM- Test Lab/Defects CORP-ERP-018	1.00
	iExpense Training IRL-2424-CBT	1.00
	Inputs to eCAPA, Originating a NC CAPA-1001	1.00
	IT System Validation WI 90711546	1.00
	Item DC Data Maintenance NV00012096	1.00
	Legacy E&AS and LSR Documents 90800191	1.00
	Level 1: CCD Basic User SYK-CMP-015	1.00
	Maintain Item Master 90785936	1.00
	Maintaining eDFU Education NV00015095	1.00
	Manage Users in PLM 90705679	1.00
	Management of Documentation CQP-REG-002	1.00
	Management of Japan Shonin Package 90711513	1.00
	Management of Study Report 90711378	1.00
	Management of Supplier Changes 90449047	1.00
	Management Review 00-01-00	1.00
	Management Structure Procedure 90795680	1.00
	Managing CAD Files 90689676	1.00
	Managing Chemical Data Table 90745589	1.00
	Manual Standard PO Creation 90785003	1.00
	Masterlist Training 2015 CORP-HR-0102	1.00
	Measurement System Analysis CQI-PDC-002-09	1.00
	MES Advanced Procedures 90709829	1.00
	Mngt of International Matrices CQI-REG-002-01	1.00
	Mobile Device Directive Training CORP-FIN-0048	1.00
	Navigation and View Information 90708988	1.00
	Nonconformance and CAPA CQI-CAP-001-05	1.00
	Oracle Item Master User Manual 90785939	1.00
	Oracle R12 Master Data Maint NV00002984	1.00
	Oracle Routing, Creation & Update NV00000163	1.00
	Parts, BOMs and Routings 90705657	1.00
	PC-Developing PC Protocols 90686850	1.00
	PC-Preclinical Study Communications 90686855	1.00
	PC-QC Procedures Scientific Data 90686848	1.00
	PC-Test Control Article Characterization 90686853	1.00
	PC-Tracking Preclinical Materials 90686852	1.00

Attachment 2 - Training Delivery and Curriculum Listing

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

PEC DeepDive CORP-PEC-0003	1.00	
PEC Process DeepDive CORP-PEC-0004	1.00	
PEMAC 5 and Web Help Desk NV00000510	1.00	
PLM Light User Training Cork NV 0067-CBT	1.00	
PMA Applications NV00022549	1.00	
Principles of Aseptic Processing PHDV71	1.00	
Products and Manage Product 90776679	1.00	
Protecting and Sharing Excel Linda.comCMP010	2.00	
Qualification Specific Programs CQI-PDC-002-13	1.00	
RA Submission Tracker Tool (STT) NV00024767	1.00	
RACM Upload to Oracle R11i 90717217	1.00	
Reporting Essentials in SLMS SYK-GEN-210	1.00	
RepStock Program 90783691	1.00	
Requesting Lot Attribute Changes NV00013704	1.00	
Requesting PLM User Access 90785471	1.00	
Requesting Shipment, Billing NV00007321	1.00	
Review and Approve a Change Notice 90705662	1.00	
Run Non Document Services NV00024066	1.00	
Search, Print and Subscribe in PLM 90705663	1.00	
Software Configuration Specification 90728273	1.00	
Software Design 90786336	1.00	
Software Development 90751558	1.00	
Software Development 90797418	1.00	
Software Risk Mgt 90800187	1.00	
Software Testing ISWKI_PMA_001	1.00	
SONIC Master Data Guide CORP-SONIC-0001	1.00	
Sonopet Ultrasonic Aspirator NSE-0025	1.00	
Sphere Approval Access CORP-DGO-0009	1.00	
Sphere Edit Access CORP-DGO-0008	1.00	
Sphere End to End Workflow CORP-DGO-0005	1.00	
Sphere Item Statuses CORP-DGO-0006	1.00	
Sphere Overview and Setup CORP-DGO-0004	1.00	
Sphere View Only Access CORP-DGO-0007	1.00	
Stryker PEC - RoHS CORP-PEC-0005	1.00	
Stryker PEC - RoHS BOMcheck CORP-PEC-0005	1.00	
Stryker WI Process Change Notice 90705668	1.00	
Stryker WI Vendor CAD Data Exchange 90723974	1.00	
Trackwise - Basics CORP-TWS-0001	1.00	
Trackwise - Getting the Data CORP-TWS-0002	1.00	
Trackwise - Scope and Query CORP-TWS-0004	1.00	

Attachment 2 - Training Delivery and Curriculum Listing

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

	TrackWise Change Control CORP-TWS-0010	1.00
	Trackwise Global CORP-TWS-GH-0004-PRE	1.00
	Trackwise Global CORP-TWS-GH-0005-ILC	1.00
	Trackwise Workflow CORP-TWS-0003	1.00
	UDI Data Definition CQF-DGO-001-A	1.00
	UDI Data Governance CQD-DGO-001	1.00
	UDI Data Maintenance CQP-DGO-003	1.00
	UDI Master Data Change Control CQP-DGO-001	1.00
	UDI MDM WI NV00009557	1.00
	UDI New Item Data Creation CQP-DGO-002	1.00
	UDI RA Process NV00010055	1.00
	Unique Device Identification CORP-UDI-0001	1.00
	Unsealed Areas Visual Standards 90772829	1.00
	Updating Lot Attributes NV00013522	1.00
	Upload Batch Data into ERP NV00022217	1.00
	User Access Provisioning ISWKI_SEC_006	1.00
	USER LEVEL CALIBRATIONS C311161-00	1.00
	Virtual Fin Intelligence Module 1 CORP-FIN-0044	1.00
	Virtual Fin Intelligence Module 2 CORP-FIN-0045	1.00
	Virtual Fin Intelligence Module 3 CORP-FIN-0046	1.00
	Virtual Fin Intelligence Module 4 CORP-FIN-0047	1.00
Continuous Improvement Skills	2014 Just in Time MasterList Training CI1	1.00
	2014 Just In Time OSV Training CI2	1.00
	2014 Just in Time: Communication CI3	1.00
	2014 Just in Time: Special Reports CI4	1.00
	Adverse Event Reporting 90744470	1.00
	Analysis Coil Catheter Samples S313553-00	1.00
	Applicants of Statistical Techniques 90718596	1.00
	Applying Lean Linda.comCI001	1.00
	Assessment Approver CORP-TWS-PFA-004	1.00
	Assessment Contributor CORP-TWS-PFA-003	1.00
	Being an Effective Team Member Linda.comCI003	1.00
	Building Influence as a Leader Linda.comCI004	1.00
	Complaint Handling 90743798	1.00
	Complaint Handling Process CQP-PMS-001	1.00
	Complaint History Document NV00021596	1.00
	Complaint Intake Center CQI-PMS-001-03	1.00
	Complaint Investigation 90743796	1.00
	Complaint Mngt Center CQI-PMS-001-04	1.00
	Complaint Review Board 90735183	1.00

Attachment 2 - Training Delivery and Curriculum Listing

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

Complaints Investigation NV00019940	1.00
Confronting Difficult Behavior Linda.comCI005	1.00
Correction Ownership Training CAPA-1005	1.00
Corrective and Preventive Action CQP-CAP-001	1.00
Creating Positive Environment Linda.comCI006	1.00
Customer Site Visit 90759747	1.00
Decontamination Samples S311612-00	1.00
DVerifi Process Val Sampling Plan 90718597	1.00
EC Declaration of Conformity 90711506	1.00
Execution Coordinator CORP-TWS-PFA-006	1.00
Foreign Material Inspection S310441-00	1.00
GCP Investigational Site 90703982	1.00
GCP Clinical Investigator Selection 90703981	1.00
General Quality System Controls MV-SOP01	1.00
Good Documentation Practices 90687428	1.00
Informed Research Authorization 90711043	1.00
Internal Quality Audit 90644048	1.00
Internal Quality Audit 90775786	1.00
International Technical File NV00019488	1.00
Introduction to Lean for Service Linda.comCI007	1.00
Investigation WI 90814901	1.00
Investigational Device Approved IDE 90711053	1.00
Leader Standard Work Process CORP-SEN-0018	1.00
Leading with Integrity 2016 CORP-CMP-1001	1.00
Lean Tools Flow and Pull Linda.comCI008	1.00
Licensing Quality Certificates RA23	1.00
Market Feedback for Complaint 90811937	1.00
Medical Device Sales Reps PRIVACY01	1.00
Medical Risk Assessor CORP-TWS-PFA-005	1.00
Metrics and Trending 90785486	1.00
Minitab Work Instruction 90814903	1.00
NC-CAPA Corporate1 CORP-CAPA-0001	1.00
NC-CAPA Corporate2 CORP-CAPA-0002	1.00
NC-CAPA Corporate3 CORP-CAPA-0003	1.00
Neurovascular 2017 Quality Objectives 90656010	1.00
NV-DIV-QLTY-PAC (Product: Accessories)	1.00
NV-DIV-QLTY-PAC (Product: AXS Infinity	1.00
NV-DIV-QLTY-PAC (Product: BGC)	1.00
NV-DIV-QLTY-PAC (Product: DAC	1.00
NV-DIV-QLTY-PAC (Product: FlowGate)	1.00

Attachment 2 - Training Delivery and Curriculum Listing

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

NV-DIV-QLTY-PAC (Product: FlowGate2	1.00
NV-DIV-QLTY-PAC (Product: Gateway MR	1.00
NV-DIV-QLTY-PAC (Product: Gateway OTW)	1.00
NV-DIV-QLTY-PAC (Product: Guider)	1.00
NV-DIV-QLTY-PAC (Product: InZone)	1.00
NV-DIV-QLTY-PAC (Product: Merci MC	1.00
NV-DIV-QLTY-PAC (Product: Merci)	1.00
NV-DIV-QLTY-PAC (Product: Neuroform)	1.00
NV-DIV-QLTY-PAC (Product: Power Supply)	1.00
NV-DIV-QLTY-PAC (Product: Synchro)	1.00
NV-DIV-QLTY-PAC (Product: Target Coils)	1.00
NV-DIV-QLTY-PAC (Product: Transend	1.00
NV-DIV-QLTY-PAC (Product: Trevo MC)	1.00
NV-DIV-QLTY-PAC (Product: Trevo)	1.00
NV-DIV-QLTY-PAC (Product: Wingspan)	1.00
NV-DIV-QLTY-Statistical Tools for Med Devices 1	1.00
NV-DIV-QLTY-Statistical Tools for Med Devices 2	1.00
NVD-QLTY-A&P (Veeva Vault)	1.00
NVD-QLTY-eCAPA (4D Methodology)	1.00
Problem Solving Building Linda.comCI009	1.00
Problem Solving: Digging Deeper Linda.comCI010	1.00
Problem Solving: Fundamentals Linda.comCI011	1.00
Process Flow Chart 90745586	1.00
Process OQ-P, PQ and PPQ 90719023	1.00
Process Validation CQI-PDC-002-01	1.00
Process Validations MV-SOP18	1.00
Processing Customer Complaint 90735559	1.00
Processing Market Feedback NV-90811937	1.00
Product Performance NV-90811940	1.00
Quality Inspections MV-SOP23	1.00
Quality Planning and Project Tracking 90656544	1.00
Quality Policy Training CORP-QP-0001	1.00
Quality Records Management 90670503	1.00
Quality Records Management 90808602	1.00
Quality System Overview MV-QSM01	1.00
Quality Tester Training Cork NV 00313-PPT	1.00
Reception Desk Audit Instructions 90658995	1.00
Reducing Waste Using Lean Linda.comCI012	1.00
Resolving Discoveries of Material 90785475	1.00
Responsible Comm CORP-LEGL-0001-CBT	1.00

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

	Seal Creep Visual Standard 90772840	1.00
	Sentinel Human Error Prevention CQG-PDC-018	1.00
	Sentinel Program Overview CORP-SEN-0000	1.00
	Sentinel-Leadership Modules CORP-SEN-0017	1.00
	Site Execution Coordinator CORP-TWS-PFA-007	1.00
	Statistical Analysis and Reporting NV00003268	1.00
	Statistical Manual Documents 90718602	1.00
	Statistical Process Control 20-02-00	1.00
	Statistical Process Control Charts 90718609	1.00
	Statistical Techniques 90715152	1.00
	Stryker Neurovascular Quality Manual 90641781	1.00
	Stryker Neurovascular Quality Policy 90648606	1.00
	Stryker NV Good Documentation 90687428	1.00
	Stryker NV Quality System Basics 90687312	1.00
	Supplier Corrective Action MV-SOP48	1.00
	Supplier Corrective Action Request 90658724	1.00
	Supplier Corrective Action Request 90689672	1.00
	Target Delivery Wire Visual Standard 90461710	1.00
	Target DW Workmanship Standard 90468228	1.00
	The Impact On Clinical Research GCP05	1.00
	Third Party Audit Procedure MV-SOP51	1.00
	Urgent Action CQF-PMS-002-04-C	1.00
	Use Design FMEA WI 90707425	1.00
	User Requirements Specification CQI-PDC-002-04	1.00
	Using Lean for and Quality Linda.comCI013	1.00
	Using Strategic Thinking Skills Linda.comCI014	1.00
	Validation CQP-PDC-002	1.00
	Validation and Qualification CQI-PDC-002-07	1.00
	Validation Exceptions CQI-PDC-002-06	1.00
	Validation Periodic Review 90719024	1.00
	Validation Planning CQI-PDC-002-03	1.00
	Validation Planning and Reporting 90719020	1.00
	Value Stream Mapping Linda.comCI015	1.00
	Vendor Training Procedure NV00012007	1.00
	Visual Standard for Target Product 90477439	1.00
Manufacturing Skills (ME) (Safety)	Accidental Release Procedure 90002231	1.00
	Airborne Particulate 90719640	1.00
	Antimicrobial Soap Review and Approval 90719635	1.00
	Chemical Characterization of Materials 90717643	1.00
	Chemical Handling Storage Areas 90008026	1.00

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

	Division Bacterial Endotoxin Testing 90719630	1.00
	Divisional Biological Safety 90707632	1.00
	Divisional Controlled Environments 90717648	1.00
	Emergency Response Procedure 90008389	1.00
	Endosafe Reader Kinetic Turbidime 90719627	1.00
	Environment, Health and Safety 90616504	1.00
	Environmental Monitoring: General 90719624	1.00
	Ethylene Oxide Sterilization 90719625	1.00
	Ethylene Oxide Sterilization Review 90719636	1.00
	Hand Sanitizer Review and Approval 90719634	1.00
	Handling Hazardous Materials 90755645	1.00
	Hazard Communication Policy 90755423	1.00
	Lock-Out-Blockout Tag Out 90773833	1.00
	Office and Cubicle Safety 90773840	1.00
	Pyros Kinetix Reader in Kinetic 90719628	1.00
	Radiation Final Report Prepapration 90768329	1.00
	Radiation Protocol Creation 90717645	1.00
	Radiation Qualification 90717646	1.00
	Radiation Sterilization Form 90717647	1.00
	Radiation Sterilization Process 90719637	1.00
	SNV Hot Work Program 90755472	1.00
	Water Microbial Testing Procedure 90719626	1.00
Manufacturing Skills (ME) (Standard)	2-Sided Acceptance Plans With Minitab 90718598	1.00
	Accelerated Aging NV00025945	1.00
	Advertising & Promotional Materials NV00020153	1.00
	Altitude Testing of Packaging 90722959	1.00
	Assembly Workmanship Standards 90482015	1.00
	Attribute Plans - Data Anal MINITAB 90718601	1.00
	Attribute Test Method Validation 90717552	1.00
	Authorship and SNV Disclosure NV00004557	1.00
	Bar Code Requirements 90722432	1.00
	Barcode Verifier System NV00013641	1.00
	Bioburden Testing Fremont 90801734	1.00
	Biocomp. Pos. Test Result Invest. 90717644	1.00
	Biocompatibility Test Briefs 90790988	1.00
	Biological Indicators in Sterilization 90783133	1.00
	biological Safety Testing 90707694	1.00
	Blanket Agreement FG Item Creation 90785001	1.00
	Bubble Leak Testing of Packaging 90722960	1.00
	Burst Testing of Packaging 90722961	1.00

Attachment 2 - Training Delivery and Curriculum Listing

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

Calibration 90707410	1.00
Calibration of IM&T Tools 90719033	1.00
CALIBRATION SYSTEM C4.11.1	1.00
CAPA & Action Ownership CAPA-1007	1.00
CAPA Review Feeder Procedure 14-00-00	1.00
Capability of Variable Data 90718605	1.00
Chain of Custody - Type Testing 90766779	1.00
Change Control CORP-GIT-0038	1.00
Change Notification 90776680	1.00
Changing of Calibration Inter 90719218	1.00
Channels Visual Standards 90772841	1.00
Chemical Pre-Conditioning and Pkg NV00006504	1.00
China Submission Related Activities NV00018287	1.00
Citadel Af Measurement TM NV00023607	1.00
Citadel Braid Chemical Etching NV00023244	1.00
Citadel Braid Dimentioning TM NV00023790	1.00
Citadel Braid Passivation NV00023445	1.00
Citadel Braid Secondary Unwinding NV00023492	1.00
Citadel Braid Secondary Winding NV00023490	1.00
Citadel Heat Treat Braid NV00023493	1.00
Citadel Ribbon Core Braid NV00023665	1.00
Citadel Steeger Braiding NV00023589	1.00
Clinical Data Management NV00003275	1.00
Clinical Document Management NV00000349	1.00
Clinical Effects Severity List - Neuro 90297495	1.00
Clinical Evaluation Report NV00023585	1.00
Clinical Experience Summary 90683744	1.00
Clinical Product Transaction Form NV00007322	1.00
Clinical Safety Plan Template NV00003927	1.00
Clinical Trial Complaint Template NV00003788	1.00
Clinical Trial Monitoring Template 90837750	1.00
Clinical Trial Protocol Template NV00003262	1.00
Clinical Trial UADE Notification NV00003278	1.00
Compilation of Technical Files 90711516	1.00
Completion of Sterilization 90769898	1.00
Conforming Seals Visual Standard 90772848	1.00
Creases Foldovers Cracks Visual 90772842	1.00
Crimped Marker Tensile (Atlas) NV00012122	1.00
Cycle 285 Sterilization Specs 90814260	1.00
Cycle 320 Sterilization Spec NV00025363	1.00

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

	Cycle 565 Sterilization Spec 90767885	1.00
	DC Power Supply Returns 90808588	1.00
	DCN Work Instruction MV-WINP0008	1.00
	Decision Tree Development 90811938	1.00
	Density Calculations Shipper Box Data 90288532	1.00
	Design and Development Planning 90735249	1.00
	Design Capability Matrix Work Inst 90701415	1.00
	Design Change 90735248	1.00
	Design Control 90735244	1.00
	Design Control 90797408	1.00
	Design History Files 90735251	1.00
	Design Input Output 90797410	1.00
	Design Review 90735246	1.00
	Design Validation 90735247	1.00
	Design Validation WI 90797414	1.00
	Design Verification 90743624	1.00
	Design Verification WI 90797413	1.00
	Device Master Record 90753154	1.00
	Device Master Record 90797412	1.00
	Device Setup Procedure 90763081	1.00
	DIOVV Template 90797411	1.00
	Divisional Palletized Load Placards 90771642	1.00
	Divisional SNV Facilities Management 90741294	1.00
	Divisional Validation 90718160	1.00
	Divisional Validation Legacy NV00021119	1.00
	Divisional WI for Biological 90717642	1.00
	DMR Change WI NV00018800	1.00
	Document and Data Control 90670501	1.00
	DRAFTING STANDARD 90689674	1.00
	Dye Penetration Testing of Packaging 90722963	1.00
	Dye Solution Preparation WI 90741369	1.00
	e-Labeling Delivery over the Internet 90734860	1.00
	eLabeling Authorization Form 90734862	1.00
	eLabeling Policy 90734851	1.00
	Electronic I9 and E-Verify Imple CORP-HR-0100	1.00
	Emitech K550X Sputter Coater NV00017350	1.00
	Engineering Design Tools 90797416	1.00
	EO Product Sterile Qualification 90770161	1.00
	EO Sterilization Product 90769856	1.00
	EO Sterilization Residual Limits 90769862	1.00

Attachment 2 - Training Delivery and Curriculum Listing

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

Equipment Controls MV-SOP15	1.00
Equipment Design and Development 90728269	1.00
Equipment Design WI 90742160	1.00
Equipment Operations and Maintenance 90791632	1.00
Equipment Product Interaction NV00022587	1.00
Equipment Qualification 90719022	1.00
Equipment Qualification CQI-PDC-002-02	1.00
Essential Elements of IC Checklist NV00002659	1.00
Essential Requirements Checklist 90711511	1.00
Etch Visual Standard Inspection NV00023758	1.00
Ethylene Oxide Process Validation 90769865	1.00
Ethylene Oxide Sterilization Controls MV-SOP27	1.00
Externally Supplied PCD Process 90788416	1.00
Facilities Utilities Qualification 90741292	1.00
Facility Access and Practices NV00022073	1.00
Fiber Tear (Tyvek) Visual Standard 90772845	1.00
Film Delamination Visual Standard 90772844	1.00
FIMS Training Process NV00025075	1.00
Finished Goods Drawing Tree 90745106	1.00
Form - EO Sterilization Placard 90768590	1.00
Form, Unscheduled Calibration Request 90719216	1.00
Fremont Microbiology 90801733	1.00
Fulfilling Request for Printed eIFU NV00016674	1.00
Gamma Sterile Review Checklist 90745984	1.00
Gamma Sterilization Placard 90771641	1.00
Gel Clot LAL Testing Procedure 90719629	1.00
GENCO-Scrap MRO Shipment 90776685	1.00
General Process Controls MV-SOP19	1.00
General Microbiology 90801729	1.00
General Specification-Pkg. Component 90726058	1.00
Generic Pouch & Label Workmanship 90157025	1.00
Generic PPE Form 90811939	1.00
Generic PPE Form NV-90811939	1.00
Global WI Design Review 90575423	1.00
GLS Label Design WI for WV 90798763	1.00
GLS Labeling 90722434	1.00
Gowning Procedure for Controlled S310957-00	1.00
Gowning Procedure for Silicon Room 90782839	1.00
Gowning Product Analysis Lab NV00011746	1.00
Gowning Room and Materials Airlock NV00020554	1.00

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

GS1 Barcode Standard CQP-PKG-006	1.00
Guidelines on Medical Devices MEDDEV 2.12-1	1.00
Guidewire Friction Tester Calib NV00002662	1.00
Handling and Disposal of Biohazards 90808593	1.00
HDE Device Release Procedure 90703348	1.00
Heat Seal Peel Testing of Packaging 90722965	1.00
HemoPore Product Training NSE-0023	1.00
Hold CQP-PMS-006	1.00
How to fill Calibration Forms 90719031	1.00
Incoming Inspection Procedure 90788116	1.00
Informed Consent Review Form NV00003265	1.00
Inspection and Testing 90756417	1.00
installation Qualification Equipment SOPC4.9.5	1.00
Internal Calibration Certificate 90719219	1.00
Internal Document Controls MV-SOP03	1.00
Janitorial Services 90741295	1.00
Janitorial Services MV-WINP0004	1.00
JEOL JSM 6460LV SEM Maintenance 90763192	1.00
Keyence Microscope Calibration NV00006631	1.00
Label Symbology Directory WI 90722439	1.00
Labeling Content Requirements 90714057	1.00
Labeling Instructions NV00017278	1.00
Labeling of Demo Product 90776690	1.00
Labeling Process Controls 90722447	1.00
LAL Test Procedure 90801738	1.00
Latex and Phthalates Notification 90745588	1.00
Lead Management CUST.S02.P06	1.00
Line Clearance for Fremont 90164551	1.00
Lone Working Procedure 90159517	1.00
LSF and LTT WI 90722441	1.00
Managing Positive Biocomp Test Results 90707716	1.00
Manufacturing Environment 90744471	1.00
Manufacturing Environment NV00000298	1.00
Manufacturing Lot History Records MV-SOP26	1.00
Material Receiving MV-SOP22	1.00
MDR Reporting 90743799	1.00
MFG & Distribution Holds WI 90731198	1.00
MMC Area Access and Practices NV00022071	1.00
New Chemical Introduction 90755430	1.00
Non-Stryker Products CORP-LGL-0006	1.00

Attachment 2 - Training Delivery and Curriculum Listing

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

	Nonhomogeneous Undersealed Areas 90772832	1.00
	NPI and Finished Good Setup NV00005389	1.00
	NV North America Training NV00000188	1.00
	Oversealed Areas 90772836	1.00
	PAC Handling Biohazards 90808590	1.00
	PAC Lab Cleaning Procedure 90808585	1.00
	PAC Neurovascular SUD Returns 90808584	1.00
	Packaging and Labeling Design 90714273	1.00
	Packaging and Labeling Document 90741899	1.00
	Packaging Requirements 90714056	1.00
	Packaging Testing Overview 90714058	1.00
	Particle Analysis Stent Deployment 90280891	1.00
	PCD Assembly, Processing Shipment 90783131	1.00
	Pkg and Labeling Review 90726595	1.00
	PPE Decision Tree 90811940	1.00
	PPE Form Development NV-90811938	1.00
	Preventative Maintenance 90739578	1.00
	Preventive Maintenance and Calib 90774108	1.00
	Process Change Analysis Form 90739843	1.00
	Process for Sterilization Pouches 90788150	1.00
	Product Bioburden 90719632	1.00
	Product Bioburden Testing Procedure 90719641	1.00
	Product Controls & Monitoring MV-SOP20	1.00
	Product Design and Development MV-SOP11	1.00
	Product Disposal 90792409	1.00
	Product Distribution MV-SOP30	1.00
	Product Evaluation for Sterilization 90719642	1.00
	Product Field Action CQP-PMS-002	1.00
	Product Field Action Assessment CQI-PMS-002-04	1.00
	Product Field Action Electronic CQI-PMS-002-06	1.00
	Product Field Action Execution 90692570	1.00
	Product Field Action Execution CQI-PMS-002-05	1.00
	Product Labeling Style Guide 90722446	1.00
	Product Shipment Release 90751337	1.00
	Product Specification 90735250	1.00
	Product Sterile. Qualification Report 90770163	1.00
	Product Storage MV-SOP25	1.00
	Protocol Revision Change NV00003264	1.00
	Protocol Synopsis Template NV00003263	1.00
	RA Japan Shonin Package Development 90812738	1.00

Attachment 2 - Training Delivery and Curriculum Listing

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

Randomization Spec Form NV00003274	1.00
Rationale Use of an Investigator NV00003260	1.00
Receiving Inspection 10-01-00	1.00
Requirements for Change Notices NV00003806	1.00
Returned Product Decontamination 90808592	1.00
Return Material Authorization NV00004170	1.00
Rounding and Significant Digits 90718606	1.00
RP Clamshell Internal Calibration NV00003023	1.00
Set Visual Standard Inspection NV00023759	1.00
Shelf Life Tracking Procedure NV00022163	1.00
Shipping of EO Residual Test 90771137	1.00
SilverGlide Overview NSE-0026	1.00
SNV Component Material 90766442	1.00
SNV Electrical Safety Program 90741293	1.00
SOP Engineering Design Standard 90701416	1.00
SOP FDA Device Listing and Esta 90711512	1.00
Stent Tracking Force Test Method 90417085	1.00
Sterilization Checklist-Cycle 565 90719645	1.00
Sterilization Residual Report Template 90786759	1.00
Sterilization Review 90719631	1.00
Sterilization Review Checklist NV00015983	1.00
Sterilization Specification NV00015984	1.00
Sterilization Technical Report Form 90769860	1.00
Stryker Laboratory Notebooks 90679278	1.00
Stryker SOP External Standards 90719656	1.00
Stryker Tech Doc for TF and DD 90711510	1.00
TA Instruments Q100 DSC NV00020246	1.00
Test Method Validation 90717551	1.00
Test Method, Particle Analysis NV00001682	1.00
Tip Buckling TM 90424577	1.00
TM Atlas Stent Delivery Wire Tensile NV00006660	1.00
TM Atlas Stent Length NV00006983	1.00
TM Evaluate Nylon Pouch-Seal Interface 90726060	1.00
TM Wire Fracture 90117356	1.00
TM, Stent Deploy Force Accy Fremont 90421894	1.00
TM, Stent Radial Force NV00002030	1.00
TM, Stent Transfer and Pull Back Force 90410995	1.00
TM. Stent Delivery Wire Withdrawal 90410998	1.00
Tolerance Analysis 90701412	1.00
Using Zero Aceptance Sampling 90718600	1.00

Attachment 2 - Training Delivery and Curriculum Listing

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

	Vander Stahl Sealer Operation Maint 90783020	1.00
	Visual Inspection of Packaging Seals 90722966	1.00
	Visual Standard for Ablated Wire 90491766	1.00
	WI Dimensional Atlas SDS NV00009287	1.00
	WI for EO SRR Template 90786765	1.00
	WI LLI Setup for IFU/eIFU NV00022308	1.00
	WI Ultrasonic Cleaning Citadel NV00023423	1.00
	WI, Stryker EPDM Migration Tool NV00003388	1.00
	Wire Flexure Test 90117236	1.00
	Work Instruction, RACM Update NV00003211	1.00

Training Proposal for:

Santa Clarita Community College District

Agreement Number: ET18-0162

Panel Meeting of: January 24, 2018

ETP Regional Office: North Hollywood   **Analyst:** M. Webb

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate SB <100	Industry Sector(s):	Aerospace and Defense Manufacturing Engineering Services Priority Industry: ☒ Yes ☐ No
Counties Served:	Los Angeles, Ventura, Santa Barbara, San Luis Obispo	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☐ Yes ☒ No		
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		≤20%	

FUNDING DETAIL:

Program Costs	+	**Support Costs**	=	**Total ETP Funding**
$605,584		$42,000 8%		$647,584

In-Kind Contribution:	50% of Total ETP Funding Required	$526,160

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours Class / Lab	CBT	Average Cost per Trainee	Post-Retention Wage
1	Retrainee Priority Rate	Business Skills, Computer Skills, Continuous Impr, Hazardous Materials, Management Skills, Manufacturing Skills, Adv. Technology	400	8-200 Weighted Avg: 60	0	$1,155	$16.70
2	Retrainee	Business Skills, Computer Skills, Continuous Impr, Hazardous Materials, Management Skills, Manufacturing Skills, Adv. Technology	80	8-200 Weighted Avg: 58	0	$930	$16.70
3	Retrainee Priority Rate SB<100	Business Skills, Computer Skills, Continuous Impr, Hazardous Materials, Management Skills, Manufacturing Skills, Adv. Technology	60	8-200 Weighted Avg: 60	0	$1,668	$16.70
4	Retrainee SB<100	Business Skills, Computer Skills, Continuous Impr, Hazardous Materials, Management Skills, Manufacturing Skills, Adv. Technology	8	8-200 Weighted Avg: 59	0	$1,388	$16.70

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

Minimum Wage by County: Job Numbers 1-4: $17.54 per hour for Los Angeles County; $16.70 per hour for Ventura, Santa Barbara, and San Luis Obispo Counties.
Health Benefits: ☒ Yes ☐ No   This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe
Participating employers may use up to $2.50 per hour in health benefits to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Manager		20
Supervisor		30
Team Lead		35
Operator		40

Assembler		35
Engineer		30
Programmer		30
Purchasing/Inventory/Buyer		35
Technician		30
Inspector		28
Clerk		30
Analyst		30
Mechanic		25
Chemist		10
Designer		15
Model Maker		10
Tool Maker		10
Production Coordinator		20
Machinist		40
Planner		30
Sales Staff		15

INTRODUCTION

Santa Clarita Community College District (SCCCD) (www.canyons.edu), founded in 1969, is a two year, fully accredited community college. The College's Employee Training Institute (ETI), a contract education unit, has successfully offered training programs to employers in the area. SCCCD continues to grow, increasing the number of participating employers it serves over the last six years. To meet employer needs, the College updates its curriculum and training programs in the Engineering, Aerospace, and Manufacturing industries. This will be the College's 14th ETP Agreement, the fifth in the past five years.

PROJECT DETAILS

Employers are in need of highly skilled workers in the Manufacturing, Engineering, and Aerospace Industries. To identify training needs of the business community and local workforce, SCCCD collects training needs data through interviews and meetings with key managers at their company locations. Online training needs surveys are also sent to companies. Information received assists ETI to develop content for curriculum topics.

ETI training programs will include the latest computer technologies to guarantee curriculum topics are relevant and up-to-date in 3D technologies and computer software programs. SCCCD installed new computer workstations in July 2017. These stations are used to provide training in the following software technologies: advanced technology software applications, updated Computer-Aided Design/Computer Aided Manufacturing software (CAD/CAM), new manufacturing related software, updated operating systems, and new coordinate measuring machine software (CMM).

Training programs developed improve the skill sets of workers and develop staff into highly skilled, better performing employees. New skills enhance the employer's ability to grow and increase efficiencies. Workers will develop the skills needed to retain employment and replace seasoned staff set to retire within the next few years.

Training Plan

Business Skills: Training will be offered to Managers, Supervisors, Teal Leads, Engineers, programmers, Purchasing Staff, and Clerks. Training topics will focus on project planning, customer service, and business performance.

Management Skills: Training will be offered to Managers and Supervisors to enhance leadership skills. Courses provided will improve management skills to motivate and train staff in the workplace.

Computer Skills: Training will be offered to all occupations to increase staff ability to utilize computer software programs on a daily basis.

Manufacturing Skills: Training will be offered to Managers/Supervisors, Team Leads, Operators, Assemblers, Engineers, Programmers, Technicians, Inspectors, Mechanics, Designers, Tool/Model Makers, Production Coordinators, and Machinists. Training delivered will improve staff skill sets and introduce updated methods in lean manufacturing.

Continuous Improvement: Training will be offered to all occupations to increase productivity and improve employer operating functions. Training will include topics on team building, problem solving, and decision making.

Hazardous Materials: Training will be offered to Supervisors, Team Leads, Machine Operators, Technicians, and Inspectors. Training provided will learn methods and techniques to properly handle hazardous chemicals.

Advanced Technology:

Engineers, Designers, Managers/Supervisors, and Programmers will participate in Advanced Technology training to ensure workers are up to date with new 3-D computer technology. Courses provided will include Computer-Aided Design/Manufacturing software such as Unigraphics, Master CAM, and Solidworks. Advanced Technology courses are heavily requested by Employers and taught by qualified instructors with hands-on industry experience.

Maintenance, licenses, and hardware required to run these programs can cost between $10K to $40K per unit. Employers must also upgrade and replace computer software and hardware to ensure current technology and the ability to meet customer needs. The trainer-to-trainee ratio for AT courses will not exceed 1:10, to allow in-depth coverage and personal attention from the instructor.

Commitment to Training

Participating employers will continue to provide company-wide training alongside ETP training such as safety, sexual harassment prevention, and other on-the-job training.

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

➢ Training Infrastructure

SCCCD's Employee Training Institute (ETI) staff will perform all administrative duties including data entry, tracking and scheduling, customizing curriculum, and meeting with ETP staff to monitor the training program.

Impact/Outcome

SCCCD offers the following certifications following completion of ETI training programs: Certified SolidWorks Associate (CSWA), Certified SolidWorks Professional (CSWP) and Certified SolidWorks Expert (CSWE); Association of Operations Management (APICS) Certified in Production and Inventory Management (CPIM) and Certified Supply Chain Professional (CSCP); and Project Management Institute (PMI) Project Management Professional (PMP) certification; Lean Six Sigma Yellow Belt, Green Belt, and Black Belt Certifications, and National Institute of Metalworking Skills (NIMS), and Manufacturing Skill Standards Council (MSSC) in progress.

Marketing and Support Costs

SCCCD continuously updates its curriculum offerings to ensure training programs meet the needs of participating employers. Training programs have been developed alongside Employer Advisory Groups who are considered experts in manufacturing, computer technology, and electronics fields. ETI staff has increased its working relationships with employers and meets with business leaders regularly to expand and grow the college's training programs.

SCCCD has also developed a broad network of active connections with CEO's, managers, professional organizations, non-profit resource groups, and WIOA funded organizations. Advisory boards comprised of business leaders in the local community are advocates of ETI training programs and refers ETI on a regular basis.

Following each training session, participants are given surveys on training provided. These surveys, along with other pre and post assessments, ensure training instructors are capable of delivering topics in a thorough manner that will improve employee job performance. In addition, ETI staff will continue to market SCCCD training programs to local economic development groups to secure new training opportunities with new employers. As a result, the College is requesting and staff recommends 8% support costs to help with marketing and employer feedback.

Trainer Qualifications/Training Coordinator

ETI employs instructors with strong backgrounds in training, manufacturing, and engineering. Instructors meet with participating employers to develop the best suited training program for their company. By doing so, companies are able to target key areas to increase efficiencies and improve employee skills. All trainers are accomplished in adult education and adult learning theory.

Training Agency Certification

SCCCD is accredited by the Accrediting Commission for Community and Junior Colleges (ACCJC) and Western Association of Schools and Colleges.

Tuition Reimbursement

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

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0263	$548,205	10/31/2016-10/30/2018	530	353	27

Based on ETP Systems, 24,445 reimbursable hours have been tracked for potential earnings of $477,316 (85% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to by employers and in progress through February 2018 for approximately 150 trainees. A total of approximately 353 trainees have completed the 90-day retention period and are on track for final billing for January 2018.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET15--0346	Santa Clarita	01/02/2015-01/01/2017	$468,474	$468,474 (100%)
ET13-0299	Santa Clarita	03/01/2013-02/28/2016	$401,488	$401,488 (100%)
ET11-0210	Santa Clarita	04/04/2011-04/03/2013	$398,611	$396,384 (99%)

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
- Business Performance
- Business Writing
- Project Management
- Communication Skills
- Negotiating
- Conflict Resolution
- Customer Service
- Inventory Control
- Business Planning
- Financial Strategies
- Merchandising
- Human Resources Management (interviewing, job descriptions, salary schedules, counseling, performance appraisals, etc.)
- Sales

COMPUTER SKILLS
- Advanced Excel
- Microsoft Project
- Adobe
- Access
- Advanced PowerPoint
- MRP/ERP/SAP/Oracle
- Database Essentials
- Basic MS Office (For small business employers only)

CONTINUOUS IMPROVEMENT
- Lean Processes and Principles
- Six Sigma
- Kaizen Methodology
- Statistical Process Control
- Problem Solving
- Team Building
- Quality Concepts
- Total Quality Management
- ISO
- Just-In-Time Processes
- Production Scheduling
- Value Stream Mapping
- Decision Making
- Leadership Skills for Frontline Workers
  - Decision Making
  - Teambuilding
  - Change Management

HAZARDOUS MATERIALS
- Hazardous Materials Handling
- Hazardous Chemical Cleaning/Handling

- Hazardous Waste Cleaning
- Environmental Monitoring and Personal Protection Equipment
- Hazardous Waste Management and Transportation
- Environmental Liability and Risk Management
- Solid Waste Recycling

MANAGEMENT SKILLS (management trainees only)
- Leadership
- Motivation
- Administration
- Coaching

MANUFACTURING SKILLS
- Operations Management
- Fundamentals of Planning
- Manufacturing Control
- Production Operations
- Parts and Products Manufacture
- Equipment Operation
- Assembly Procedures
- Inventory Control
- Warehousing
- Manufacturing Practices
- Cross-Training in Production Equipment/Skills
- CNC Machine Operation
- CNC Programming
- Geometric Dimensioning and Tolerancing
- Hydraulics
- Blueprint Reading
- Welding
- Inspection Techniques
- Shop Math

AT Hours
8-200

ADVANCED TECHNOLOGY (limited ratio 1:10)
- Master CAM X (CAD/CAM program)
- SolidWorks (CAD/CAM program)
- Reverse Engineering
- CMMI (Coordinate Measurement Machine Inspection)
- Rapid Prototyping / Additive Manufacturing
- Automated Inspection
- Unigraphics (CAD/CAM program)
- Advanced Programming
- CATIA (Computer Aided Three Dimensional Interactive Application, CAD/CAM program)

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

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

Participating Employers in Retrainee
Multiple Employer Contracts

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Aerospace Dynamics International, Inc.

Address: 25540 Rye Canyon Road

City, State, Zip: Valencia, CA 91355-1169

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 100

Total # of full-time company employees worldwide: 580

Total # of full-time company employees in California: 580

Company: Advantage Media Services (AMS Fulfillment)

Address: 29010 Commerce Center Dr.

City, State, Zip: Valencia, CA 91355

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 250

Total # of full-time company employees worldwide: 315

Total # of full-time company employees in California: 314

Company: Air Flow Research Heads, Inc.

Address: 28611 W. Industry Drive

City, State, Zip: Valencia, CA 91355

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 60

Total # of full-time company employees in California: 60

Company: Aquafine Corporation

Address: 29010 Avenue Paine

City, State, Zip: Valencia, CA 91355

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 130

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

ETP 100B (1/09)

Participating Employers in Retrainee
Multiple Employer Contracts

Company: Classic Wire Cut Company, Inc.

Address: 28210 Constellation Road

City, State, Zip: Valencia, CA 91355

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 120

Total # of full-time company employees worldwide: 136

Total # of full-time company employees in California: 136

Company: Crissair, Inc.

Address: 28909 Avenue Williams

City, State, Zip: Valencia, CA 91355

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 150

Total # of full-time company employees worldwide: 196

Total # of full-time company employees in California: 196

Company: Forrest Machining, Inc.

Address: 27756 Avenue Mentry

City, State, Zip: Valencia, CA 91355

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 24

Total # of full-time company employees worldwide: 224

Total # of full-time company employees in California: 224

Company: HRD Aerosystems

Address: 25555 Avenue Stanford

City, State, Zip: Valencia, CA 91355

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 24

Total # of full-time company employees worldwide: 160

Total # of full-time company employees in California: 120

Participating Employers in Retrainee
Multiple Employer Contracts

Company: Lockwood Industries Inc. (FRALOCK)

Address: 28525 W. Industry Drive

City, State, Zip: Valencia, CA 91355

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 170

Total # of full-time company employees in California: 168

Company: RAH Industries

Address: 24800 Rockefeller

City, State, Zip: Valencia, CA 91355

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 182

Total # of full-time company employees in California: 182

Company: Stratasys Direct Manufacturing

Address: 28309 Avenue Crocker

City, State, Zip: Valencia, CA 91355

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 122

Total # of full-time company employees worldwide: 536

Total # of full-time company employees in California: 290

Training Proposal for:

Studio Arts, Ltd.

Agreement Number: ET18-0158

Panel Meeting of: January 24, 2018

ETP Regional Office: North Hollywood   **Analyst:** E. Wadzinski

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate SB <100	Industry Sector(s):	Multimedia/Entertainment
			Priority Industry: ☒ Yes ☐ No
Counties Served:	Los Angeles, Orange	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☒ Yes ☐ No Motion Picture Editors Guild IATSE Local 700; Make-Up Artists and Hair Stylists Guild IATSE Local 706; Studio Transportation Drivers Local 399; The Animation Guild IATSE Local 839; Script Supervisors/Continuity, Coordinators, Accounts & Allied Production Specialists Guild Local 871		
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		0%	

FUNDING DETAIL

Program Costs	+	**Support Costs**	=	**Total ETP Funding**
$561,600		$39,000 8%		$600,600

In-Kind Contribution:	50% of Total ETP Funding Required	$691,200

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours Class / Lab	CBT	Average Cost per Trainee	Post-Retention Wage
1	Retrainee Priority Rate	Advanced Technology	300	8-240 Weighted Avg: 36	0	$1,001	$17.50
2	Retrainee Priority Rate SB<100	Advanced Technology	300	8-240 Weighted Avg: 36	0	$1,001	$17.50

Minimum Wage by County: $17.54 for Los Angeles County and $17.50 for Orange County.
Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: ☐ Yes ☐ No ☒ Maybe
Participating employers may use health benefits to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Animator 1		45
Animator 2		30
Art Director 1		20
Art Director 2		25
Artist 1		50
Artist 2		40
Compositor 1		65
Compositor 2		20
Construction Coordinator 1		10
Construction Coordinator 2		10
Costume Designer 1		15
Costume Designer 2		15
Editor 1		20
Editor 2		20
Hair Stylist 1		2
Hair Stylist 2		2
Illustrator/Storyboard 1		20
Illustrator/Storyboard 2		20
Lighting Tech 1		15
Lighting Tech 2		10
Makeup Artist 1		2
Makeup Artist 2		2

Matte Artist 1		5
Matte Artist 2		5
Model Maker 1		10
Model Maker 2		10
Modeler 1		15
Modeler 2		5
Ornamental Plasterer 1		2
Ornamental Plasterer 2		2
Production Designer 1		4
Production Designer 2		4
Prop Designer/Animation 1		5
Prop Designer/Animation 2		5
Prop Maker 1		5
Prop Maker 2		5
Set Decorator 1		5
Set Decorator 2		5
Set Designer 1		10
Set Designer 2		10
Technical Director 1		10
Technical Director 2		10
Textures Artist 1		2
Textures Artist 2		2
Visual Development 1		4
Visual Development 2		2

INTRODUCTION

Founded in 2001, Studio Arts, Ltd. (Studio Arts) (www.studioarts.com) is a private training company for high-tech, computer-based software and hardware for the motion picture, television and post-production industries located in Los Angeles. The school serves motion picture and television production, visual effects, game, production design, mobile entertainment, educational entertainment and online gaming, set design, prop-making, and model-making companies in Southern California. This is Studio Arts seventh ETP proposal, its fifth in the last five years.

PROJECT DETAILS

The entertainment industry is changing at a rapid pace; undergoing frequent technological changes that happen quickly and dramatically. The present state of the business now involves more streaming-oriented short productions (episodic dramas, comedies, animation) and ever-changing innovations in the way these productions are being delivered. Most productions are being done by companies that are much more compact and flexible. Shows intended for web streaming now dominate the production scene. Most productions are now being done by companies such as HBO, Showtime, Netflix, Amazon, Hulu and Google. Many of these companies are web-based, and use the internet and associated mobile media delivery systems to provide consumer content. As such, most productions now have shorter production times and are often developed, shot and assembled at multiple, (often out-of-state) locations.

Additionally, there have been changes to release protocols of theatrical films. These are no longer automatically released in theaters. Many are broadcasted on cable or streamed directly to consumers. Cable now dominates as a major distribution network. It will not be long until cable is overtaken by the internet which has become gigantic in scope.

Video games, are also becoming more cinematic and complex, some with "Virtual Reality" technology (also referred to as immersive media). These new technologies are becoming an increasingly important source of entertainment, bringing new standards and complexities to production.

Training Plan

Competition for production is fierce. Most production and post-production work can be delivered digitally, and the product can also be transmitted digitally. This technology has opened the door for out-of-state companies to aggressively compete with California's local industry. This production competition necessitates the adaptation, implementation and rapid deployment of a highly trained California workforce.

Advanced Technology

Advanced Technology training will be delivered to all occupations. Studio Arts will train workers in various aspects of animation, computer graphics, digital television, feature film production, visual effects and post-production focusing specifically on digital art and technology as it relates to character design and animation, set design and construction, motion capture, green/blue screen technology, digital storyboarding, lighting, graphics, and special effects. Training will equip workers with the most marketable skills available in a highly competitive and technically sophisticated industry.

This training is designed for highly skilled occupations that typically require a Bachelor of Arts or Bachelor of Science degree or higher (e.g. in Animation, Art, Architecture, Computer Science, Computer Programming, Interior Design, Production Design) plus commensurate industry experience. The work requires a great deal of skill and accuracy with an expansive understanding of art and computers.

About 80% of the training will be delivered at the Studio Arts facility in Los Angeles and the other 20% at employer worksites. Center-based training will be delivered by industry experts in classrooms equipped with state-of-the-art; production-ready equipment and software intended to provide skills for professional, production-ready work. The equipment and software are expensive to purchase, operate, and maintain. A typical computer outfitted with the software costs in excess of $6,000, and the trainers' pay rate often exceeds $100 per hour. The highly technical material necessitates small classes of no more than 10 students per trainer, which also drives the cost. Studio Arts' normal published rates are $50 per training hour.

Commitment to Training

Core participating employers have stated that they occasionally provide employer orientation and some basic training on their own, but lack the necessary operational overhead, space, equipment, software, and expert instructors to effectively train their workers.

Employers have shown their ongoing commitment to training by contributing staff time to organize training, providing on-the-job reinforcement, providing technical upgrades, and allowing some trainees to take classes during work time. Studio Arts continually endeavors to have employers increase their own financial commitment to continued training efforts.

Training Agency Certification

Studio Arts is eligible as a training agency licensed by the Bureau for Private Postsecondary Education.

Marketing and Support Costs

Studio Arts markets its training to employers via informational meetings and seminars, conferences, trade magazine advertising, posters, and mailing brochures, as well as the internet and e-mail. The Company may also advertise through Workforce Investment Boards, human resources departments and staff.

There are currently five dedicated staff members who conduct employer marketing, recruitment, assessment, and provide project administration and tracking. Studio Arts is requesting 8% support for employer recruitment and needs assessments activities that will be ongoing throughout the term of the contract. Studio Arts recruits from a very large labor market. Due to rapid technological changes, they must spend a significant amount of time matching employer needs to the curriculum. Thus, staff recommends support costs.

Curriculum Development

The curriculum has been designed to meet rigorous industry and employer-specific needs for production companies, guilds, and unions of the motion picture, television, and post-production industries. Studio Arts holds trade advisory meetings attended by visiting company representatives and industry experts who help develop curriculum to address immediate, short- and long-term needs. Email surveys, interviews, and consultations are held with production management and potential trainees to determine course content.

Studio Arts routinely employs assessment forms completed by students at the end of every class, and maintains close relationships with employers, unions, and trade organizations to ensure that training is relevant and effective.

Union Support

Included in the core group of employers are trainees represented by a total of five collective bargaining units. ETP has received letters of support from all collective bargaining units (See Page 1).

Training Hours Limitation

Studio Arts is requesting a waiver to exceed the standard cap of 200 hours of training to allow up to 240 hours of training for a small number of trainees. Since 2007, Studio Arts offers a Skills Mastery Program to unemployed individuals seeking entertainment-industry careers participating in the WIA program as approved by I-Train. The curriculum consists of eight, 30-hour courses from the school's standard curriculum, and provides technical skills training in various software.

The Mastery Certificate of Completion is issued after completion of 240-hours of courses (versus single classes) in recognized skills sets such as 2D Digital Animation, Compositing and Visual Effects, and Digital Set Design. Certification will give trainees competence in specific core skills for software, hardware or application (e.g. Certificate of Completion for Digital Set Design – competency in AutoCAD, Vectorworks, Rhino and SketchUp Pro). Studio Arts expects less than 4% (an estimated 20 trainees) to participate in this training.

Retention

Retention is at least 90 consecutive days full-time with one employer. Full-time employment means 35 hours per week. Retention can also be 500 hours in 272 days with one or more employers, in keeping with the Panel's regulatory standards for motion pictures production workers. Studio Arts is requesting this modification.

Tuition Reimbursement

Students enrolled in ETP-funded training 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 the training hour modification and the alternative retention.

ACTIVE PROJECTS

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0405	$899,712	01/28/2017–01/27/2019	852	514	107

Based on hours tracked in ETP systems, the Contractor has provided 24,410 hours to trainees who have completed the minimum number of training hours required by ETP, sufficient training hours for potential earnings of $678,110 (75% of approved amount). However, the Contractor anticipates exhausting all ETP training funds by the end of February or March 2018, earning 100% of approved amount. Due to the alternate retention of 500 hours within 272 days as permitted for the entertainment industry, most retention will be completed towards the end of the contract. Many trainees work for production companies with hiatus periods or down time in between productions requiring the alternate retention period.

PRIOR PROJECTS

The following table summarizes performances by Studio Arts under ETP Agreements that were completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned
ET16-0151	Los Angeles	08/29/15-08/28/17	$899,608	$899,608 (100%)
ET15-0248	Los Angeles	08/24/2014–08/23/2016	$749,749	$741,050 (99%)
ET13-0359	Los Angeles	04/27/2013–04/26/2015	$749,705	$731,223 (98%)
ET12-0290	Los Angeles	01/27/2012–01/26/2014	$499,499	$483,116 (97%)

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

8-240   Trainees may receive any of the following:

ADVANCED TECHNOLOGY

- 2D Digital Animation
- 3D Storyboarding and Rough Layout
- Adobe Lightroom
- After Effects
- Avid
- AutoCAD
- CG Animation
- Character Design
- Cinema 4D
- Comic Book Illustration
- Composting
- Concept Design
- Corel Painter
- Costume Plot Pro
- Creature Design
- DaVinci Resolve
- Demo Reels
- Digital Design and Illustration
- Digital Drafting
- Digital Storyboarding
- Entertainment Design
- Environmental Design
- Eyeon Digital View
- Final Cut
- Filemaker Pro
- Fusion
- FX Dynamics and Systems
- Game Design
- Graphic Design and Illustration
- Houdini
- InDesign
- Illustrator - Advanced Tools
- Lighting, Dynamics and VFX
- MARI
- Mac OS
- Marvelous Designer
- Maya
- Mobile Gaming
- Modeling
- Modo
- Motion Capture
- Motion Graphics
- Motion Tracking

- NUKE
- Painting and Textures
- Photoshop for Art and Costume Designs
- Photoshop Compositing
- Production Design
- Rapid Prototyping
- Red Camera
- Renderman
- Revit
- Rhino
- Rigging
- Roto & Tracking with MOCHA
- Scripting (Unity, Python, Unreal)
- SketchUp Pro
- Solidworks
- Special Effects Makeup
- Substance Designer
- Textures
- Toon Boom
- Topography Graphic Design
- Unity
- Vectorworks
- Virtual Reality (VR) Production, Design, Animation, Gaming
- Visual Effects
- ZBrush

> Note: Reimbursement for retraining is capped at 240 total training hours regardless of the method of delivery.

Participating Employers in Retrainee
Multiple Employer Contracts

Contractor's Name: Studio Arts, Ltd.	CCG No.: ET18-0158
Reference No: 18-0037	Page: 1 of 9

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Alchemy Studios

Address: 9818 Glenoaks Blvd.

City, State, Zip: Sun Valley, CA 91352

Collective Bargaining Agreement(s): no

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

Total # of full-time company employees worldwide: 5

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

Company: Ayzenberg Group

Address: 49 E Walnut Street

City, State, Zip: Pasadena, CA 91103

Collective Bargaining Agreement(s): no

Estimated # of employees to be retrained under this Agreement: 30

Total # of full-time company employees worldwide: 150

Total # of full-time company employees in California: 150

Company: Daniels Engraving

Address: 571 5th Street

City, State, Zip: San Fernando, CA 91340

Collective Bargaining Agreement(s): no

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

Total # of full-time company employees worldwide: 6

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

Company: DeRouchey Foam

Address: 13618 Vaughn Street

City, State, Zip: San Fernando, CA 91340

Collective Bargaining Agreement(s): no

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

Total # of full-time company employees worldwide: 8

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

ETP 100B (1/09)

Participating Employers in Retrainee
Multiple Employer Contracts

Company: Digital Film Tree

Address: 3475 Cahuenga Blvd

City, State, Zip: Los Angeles, CA 90068

Collective Bargaining Agreement(s): no

Estimated # of employees to be retrained under this Agreement: 4

Total # of full-time company employees worldwide: 24

Total # of full-time company employees in California: 24

Company: Fractured FX

Address: 1009 S Mountain Ave

City, State, Zip: Monrovia, CA 91016

Collective Bargaining Agreement(s): no

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

Total # of full-time company employees worldwide: 12

Total # of full-time company employees in California: 12

Company: GIPHY Studios

Address: 759 North Spring Street

City, State, Zip: Los Angeles, CA 90012

Collective Bargaining Agreement(s): no

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

Total # of full-time company employees worldwide: 89

Total # of full-time company employees in California: 18

Company: "GLOW"- Glitter Pictures

Address: 5808 W Sunset Blvd

City, State, Zip: Los Angeles, CA 90028

Collective Bargaining Agreement(s): 399, 700,706, 871

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

Total # of full-time company employees worldwide: 120

Total # of full-time company employees in California: 120

Contractor's Name: Studio Arts, Ltd.   CCG No.: ET18-0158

Reference No: 18-0037   Page: 3 of 9

Company: "Grace and Frankie" - Grace and Frankie Productions

Address: 5555 Melrose Ave, Bow Bldg, 2nd Floor

City, State, Zip: Los Angeles, CA 90038

Collective Bargaining Agreement(s): 399, 700,706, 871

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

Total # of full-time company employees worldwide: 110

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

Company: Here Be Dragons

Address: 823 Seward Street

City, State, Zip: Los Angeles, CA 90038

Collective Bargaining Agreement(s): no

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

Total # of full-time company employees worldwide: 40

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

Company: "Here Now" Weirdo Productions

Address: 5555 Melrose Ave

City, State, Zip: Los Angeles, CA 90038

Collective Bargaining Agreement(s): 399, 700,706, 871

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

Total # of full-time company employees worldwide: 100

Total # of full-time company employees in California: 100

Company: Jam City

Address: 3525 Eastham Drive

City, State, Zip: Culver City, CA 90232

Collective Bargaining Agreement(s): no

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

Total # of full-time company employees worldwide: 436

Total # of full-time company employees in California: 436

Company: JMP Creative - Jim McCafferty Productions

Contractor's Name: Studio Arts, Ltd.

CCG No.: ET18-0158

Reference No: 18-0037

Page: 4 of 9

Address: 3885 S Main Street

City, State, Zip: Santa Ana, CA 92707

Collective Bargaining Agreement(s): no

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

Total # of full-time company employees worldwide: 23

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

Company: Legend 3D

Address: 1500 N El Centro Ave, Suite 100

City, State, Zip: Los Angeles, CA 90028

Collective Bargaining Agreement(s): no

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

Total # of full-time company employees worldwide: 60

Total # of full-time company employees in California: 60

Company: Live Nation

Address: 7060 Hollywood Blvd

City, State, Zip: Los Angeles, CA 90028

Collective Bargaining Agreement(s): no

Estimated # of employees to be retrained under this Agreement: 125

Total # of full-time company employees worldwide: 1600

Total # of full-time company employees in California: 1600

Company: "Mayans MC" 21 Fox Productions

Address: 25135 Anza Drive

City, State, Zip: Santa Clarita, CA 91355

Collective Bargaining Agreement(s): 399, 700,706, 871

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

Total # of full-time company employees worldwide: 100

Total # of full-time company employees in California: 100

Company: NBC Entertainment Marketing & Digital

Address: 100 Universal City Plaza, Bldg 1360 - 4th floor

ETP 100B (1/09)

Contractor's Name: Studio Arts, Ltd. CCG No.: ET18-0158

Reference No: 18-0037 Page: 5 of 9

City, State, Zip: Universal City, CA 91608

Collective Bargaining Agreement(s): no

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

Total # of full-time company employees worldwide: 76

Total # of full-time company employees in California: 76

Company: NBC Universal Media LLC

Address: 100 Universal City Plaza, Building 1360 4th floor

City, State, Zip: Universal City, CA 91608

Collective Bargaining Agreement(s): no

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

Total # of full-time company employees worldwide: 3425

Total # of full-time company employees in California: 300

Company: NBC Universal Production Services

Address: 5750 Wilshire Blvd

City, State, Zip: Los Angeles, CA 90036

Collective Bargaining Agreement(s): no

Estimated # of employees to be retrained under this Agreement: 100

Total # of full-time company employees worldwide: 997

Total # of full-time company employees in California: 997

Company: Neoganda

Address: 6363 Wilshire Blvd, #550

City, State, Zip: Los Angeles, CA 90048

Collective Bargaining Agreement(s): no

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

Total # of full-time company employees worldwide: 12

Total # of full-time company employees in California: 12

Company: Nickelodeon

Address: 231 W Olive Ave

City, State, Zip: Burbank, CA 91502
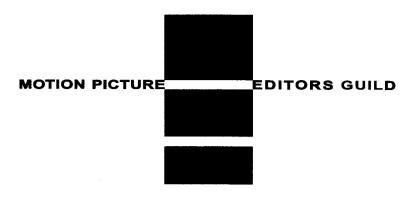
ETP 100B (1/09)

Participating Employers in Retrainee
Multiple Employer Contracts

Collective Bargaining Agreement(s): 839

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

Total # of full-time company employees worldwide: 250

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

Company: Silent House Productions

Address: 700 S Flower Street

City, State, Zip: Burbank, CA 91502

Collective Bargaining Agreement(s): no

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

Total # of full-time company employees worldwide: 10

Total # of full-time company employees in California: 10

Company: "Speechless" - TCFTV

Address: 10201 W Pico Blvd, Bldg 104, 3rd floor

City, State, Zip: Los Angeles, CA 90064

Collective Bargaining Agreement(s): 399, 700,706, 871

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

Total # of full-time company employees worldwide: 160

Total # of full-time company employees in California: 160

Company: Stoopid Buddy Studios

Address: 200 S Flower Street

City, State, Zip: Burbank, CA 91502

Collective Bargaining Agreement(s): 839

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

Total # of full-time company employees worldwide: 50

Total # of full-time company employees in California: 50

Contractor's Name: Studio Arts, Ltd.   CCG No.: ET18-0158

Reference No: 18-0037   Page: 7 of 9

Company: "Superior Donuts" - CBS Productions

Address: 4024 Radford - Lagoon 501

City, State, Zip: Studio City, CA 91604

Collective Bargaining Agreement(s): 399, 700,706, 871

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

Total # of full-time company employees worldwide: 110

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

Company: Tau Films

Address: 2404 Wilshire Blvd, Suite 6E

City, State, Zip: Los Angeles, CA 90057

Collective Bargaining Agreement(s): no

Estimated # of employees to be retrained under this Agreement: 7

Total # of full-time company employees worldwide: 98

Total # of full-time company employees in California: 14

Company: The Jim Henson Company

Address: 1416 La Brea Ave

City, State, Zip: Hollywood, CA 90028

Collective Bargaining Agreement(s): no

Estimated # of employees to be retrained under this Agreement: 30

Total # of full-time company employees worldwide: 169

Total # of full-time company employees in California: 169

Company: Tic Toc Studios

Address: 465 E Magnolia Ave, Unit G

City, State, Zip: Burbank, CA 91802

Collective Bargaining Agreement(s): no

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

Total # of full-time company employees worldwide: 27

Total # of full-time company employees in California: 27

Company: "Togetherness" - The Royal We Productions HBO

ETP 100B (1/09)

Contractor's Name: Studio Arts, Ltd. CCG No.: ET18-0158

Reference No: 18-0037 Page: 8 of 9

Address: 5800 Sunset Blvd, Bldg 11 Suite 201

City, State, Zip: Hollywood, CA 90028

Collective Bargaining Agreement(s): 399, 700,706, 871

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

Total # of full-time company employees worldwide: 110

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

Company: Trailer Park

Address: 6922 Hollywood Blvd, 12th floor

City, State, Zip: Hollywood, CA 90028

Collective Bargaining Agreement(s): no

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

Total # of full-time company employees worldwide: 466

Total # of full-time company employees in California: 466

Company: Two Bit Circus

Address: 678 S Ave 21

City, State, Zip: Los Angeles, CA 90031

Collective Bargaining Agreement(s): no

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

Total # of full-time company employees worldwide: 33

Total # of full-time company employees in California: 31

Company: Warner Bros Consumer Products

Address: 4000 Warner Blvd

City, State, Zip: Burbank, CA 91522

Collective Bargaining Agreement(s): no

Estimated # of employees to be retrained under this Agreement: 30

Total # of full-time company employees worldwide: 199

Total # of full-time company employees in California: 199

Company: "Westworld" - HBO

Address: Melody Ranch Studio, 24715 Oak Creek Ave - Bldg 14

Participating Employers in Retrainee
Multiple Employer Contracts

City, State, Zip: Santa Clarita, CA 91321

Collective Bargaining Agreement(s): 399,700,706,871

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

Total # of full-time company employees worldwide: 110

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

November 9, 2017

To Whom It May Concern:

The Editors Guild, IATSE Local 700 is pleased to participate in the proposed ETP training offered at Studio Arts. We feel that ETP training is a valued asset for our membership in order that they remain highly trained and competitive on the job.

Training initiatives, such as that offered by the Employment Training Panel, keep our members at the ready for trends in the industry that happen quickly and often. This past year Studio Arts has been training our members and we are pleased at the significant upgrades to their skills that have come as a result.

If you have any questions regarding this matter please feel free to contact me.

Sincerely,
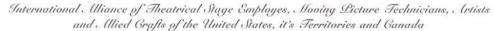
Dieter Rozek
Training Coordinator
IATSE Local 700
Motion Picture Editors Guild

International Alliance of Theatrical Stage Employes, Moving Picture Technicians, Artists
and Allied Crafts of the United States, it's Territories and Canada

MAKE-UP ARTISTS and HAIR STYLISTS GUILD
LOCAL 706

828 N. Hollywood Way, Burbank, CA 91505
(818) 295-3933 • Fax (818) 295-3930
www.local706.org

November 9, 2017

Re: ETP training offered at Studio Arts

To Whom It May Concern:

The Make-up Artists and Hairstylists Guild Local 706 IATSE is pleased to participate in the newly proposed ETP training offered at Studio Arts. We feel that ETP training is a valued asset for our membership in order for them to remain highly skilled and competitive on the job.

Training initiatives such as those offered by the Employment Training Panel keep our frontline artists at the ready for trends in industry that happen quickly and often. This past year Studio Arts has been training our members and we are pleased at the significant upgrades to their skills that have come as a result.

If you have any questions regarding this matter, please feel free to contact me at 818 295-3933 Ext. 1100.

Sincerely,

Business Representative

Local 706

Make-Up Artists & Hair Stylists Guild
I.A.T.S.E. Local 706
828 N. Hollywood Way
Burbank, CA 91505
(818) 295-3933, ext. 1100

November 10, 2017

To Whom It May Concern,

This letter is to voice Teamsters Local 399 support for ETP funding for Studio Arts this coming year.

For years now, Studio Arts has provided ETP training to our Teamsters Local 399 Brothers and Sisters who work on various productions throughout California. Many of these companies do not have the resources to do the types of training that Studio Arts provides to keep our Members at the top of their game where it comes to advanced technical skills sets.

Therefore, we ask that you fund this training in order that we can satisfy skills needs for our Membership to remain competitive for jobs likely to require them in the future.

If you have any questions regarding this matter, please feel free to contact me at 818.432-3306.

Sincerely,

Ed Duffy
Vice President
eduffy@ht399.org

November 7, 2017

To Whom It May Concern:

The Animation Guild, IATSE Local 839 is pleased to support Studio Arts' continued participation in the ETP Training Program.

Local 839 represents over three thousand animation artists and technicians in the Southern California area. The training offered to our members at Studio Arts funded by the state through the ETP program is a key factor in keeping our members up to date on the latest skills and techniques in an ever-evolving landscape of software used in animation production. Training initiatives offered by ETP keep our members attuned to trends in our industry.

Mr. Huelsman's commitment to bringing the highest quality training to the entertainment community that adjusts constantly to the needs of production across the different sectors of entertainment is appreciated by both our members and members of sister IATSE Locals throughout the Southern California region. We look forward to his continued service to those members and our contracted studio partners.

Please feel free to contact me with any questions or concerns.

Sincerely,

Jason MacLeod
Business Representative

the
animation
guild

1105 North Hollywood Way
Burbank, CA 91505-2528
T 818 845.7500   F 818 843.0300

IATSE LOCAL 839   www.animationguild.org

IATSE LOCAL 871

Script Supervisors/Continuity, Coordinators,
Accountants & Allied Production Specialists Guild

4011 W. Magnolia Blvd., Burbank, CA 91505-2833

Tel: (818) 509-7871 • Fax: (818) 506-1555
office@ialocal871.org • www.ialocal871.org

Business Representative: Leslie Simon
Email: Leslie@ialocal871.org

November 16, 2017

To Whom It May Concern:

Our Union, IATSE Local 871, enthusiastically supports the proposed ETP training offered at Studio Arts. ETP training has proven to be a valuable means for our membership to remain highly trained and competitive on the job.

It is our view that funding such as that given through Employment Training Panel keeps our members informed and ready for changes that happen quickly and often in our industry.

As a result, we are pleased to endorse ETP and the significant upgrades in our artists' skills that have and can continue to come through this valuable training.

If you have any questions regarding this matter, please feel free to contact me at (818) 509-7871, ext. 105.

Sincerely,

Leslie Simon
Business Representative
IATSE Local 871

STATE OF CALIFORNIA
ETP
EMPLOYMENT
TRAINING PANEL

Training Proposal for:

QPE Technical Institute, Inc.

Agreement Number: ET18-0161

Panel Meeting of: January 24, 2018

ETP Regional Office: San Diego   **Analyst:** H. Bernard

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee SB <100 New Hire	Industry Sector(s):	Manufacturing
			Priority Industry: ☒ Yes ☐ No
Counties Served:	Riverside, San Bernardino, Los Angeles, San Diego	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☐ Yes ☒ No		
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		≤20%	

FUNDING DETAIL:

Program Costs	+	**Support Costs**	=	**Total ETP Funding**
$240,696		$16,402 8%		$257,098

In-Kind Contribution:	50% of Total ETP Funding Required	$184,680

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	Mfg. Skills Advanced Tech.	162	8 - 200　Weighted Avg: 46	0	$885	$16.70
2	Retrainees Priority Rate SB<100	Mfg. Skills Advanced Tech.	64	8 - 60　Weighted Avg: 40	0	$1,112	$16.70
3	New Hire	Mfg. Skills Computer Skills	10	8 -260　Weighted Avg: 200	0	$4,256	*$13.66

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

Minimum Wage by County: Job Numbers 1 & 2 (Retrainees): $16.70 per hour for Riverside and San Bernardino Counties; $17.03 per hour for San Diego County; $17.54 per hour for Los Angeles County; $17.50 for Orange County. Job Number 3 (New Hires): $13.66 per hour for Riverside and San Bernardino Counties; $14.19 for San Diego County; $14.62 per hour for Los Angeles County; $14.58 per hour for Orange County.

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Numbers 1 & 2 - Retrainee		
CNC Operator		60
Set-Up Operator		50
Programmer		30
Inspector		50
CAD/CAM Operator		20
Shop Lead		2
Engineer		14

Job Number 3 – New Hire Trainees		
CNC Operator		3
Set-Up Operator		2
Inspector		2
CAD/CAM Operator		3

INTRODUCTION

Founded in 1987 and located in Anaheim, QPE Technical Institute, Inc. (QPE) is a private postsecondary training agency that provides customized Manufacturing Skills training for Southern California employers and unemployed individuals (www.qpetech.com). QPE serves small to medium-sized machine shops with training such as Computer Numerical Control (CNC) machining; Computer-Aided Design/Computer Aided Manufacturing (CAD/CAM) programming; and dimensional metrology.

Participating employers design and manufacture special tools and machines, dies, jigs, fixtures, gauges, and precision-machined parts. They come from a variety of industries including aerospace, aircraft, computer technology, medical-devices, and electronics manufacturing.

QPE is eligible for ETP funding as a private training agency and the core participating employers for retrainees will qualify as manufacturers facing out-of-state competition. The core group of employers represents 88% of the requested retrainee funding. QPE projects that approximately 80% of the proposed retrainee training will be delivered at its training facility in Anaheim and the remaining 20% of training will be for incumbent workers conducted at participating employers' facilities. All training for new hires will be conducted at QPE's training facility.

This will be the fifth agreement between ETP and QPE, the third within the last five years. However, this is the first training for New Hires will be included.

PROJECT DETAILS

Employer Demand

Retrainee

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

Training will be multi-disciplined with a focus on automated processes. To that end, QPE installed $250,000 in new equipment in 2017 at its training facility. This includes updates CAD-CAM Software, a 5 Axis Lathe, and a CNC Gantry Machine.

New Hires

According to the Employment Development Department's Labor Market Information Division, manufacturing jobs are expected to increase by 1.3 %, between 2014 and 2024. Despite the conservative growth, QPE has found that many of the employers are experiencing increasing difficulty finding qualified candidates to fill open positions. This is primarily due to the fact that CNC Operators, Set-Up Operators, CAD/CAM Operators, and Inspectors are highly skilled positions that require extensive training.

QPE works with manufacturing companies in Southern California to advise on hiring and business trends in the industry. QPE staff are continually working with HR and management personnel to determine the technical skills required for new hires and working to incorporate those skills into its curriculum. In addition, any new or emerging skills are discussed with advisory board members to determine implementation viability.

New Hire Trainee Recruitment

QPE has a relationship with the South Bay Workforce Center, the local Workforce Development Board, and receives new hire referrals from the center. This close relationship allows new hire trainees that attend QPE to leverage supportive services, resume writing services and job search services through the workforce center during training. In addition, QPE recruits new hire trainees through job fairs and plant closure assistance programs.

New Hire Trainee Completion Rates

QPE has trained new hires for 30 years and trains approximately 20 new hire trainees per year. From 2014-2015 QPE had a 100% graduation rate (44 trainees) and an 84% employment rate (37 trainees). All new hire trainees are placed in manufacturing jobs in Southern California. Under this Agreement, QPE has committed to training and placing into employment 10 new hire trainees.

Retrainee Customized Training

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

<u>TRAINING PLAN</u>

Retrainee Training

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

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

Advanced Technology – This training will be provided to Senior-Level Operators, Programmers, Engineers, Inspectors and Shop Leads. The proposed AT training in topics such as Swiss CNC

Lathe, CNC Programming, 3-D wire frame, Advanced Production Milling and Lathe, 4th and 5th Axis Milling, Advanced CAD/CAM Applications, and Rapid Prototyping will provide trainees knowledge and skills to program and run complex machining operations.

QPE requests the AT priority reimbursement rate of $26 per hour for the AT courses identified in the curriculum due to the highly technical and complex nature of the course modules. QPE reports that the costs of AT training average $64 per trainee hour. The trainer-to-trainee ratio is 1:10 for AT, to allow in-depth coverage and personal attention from the instructor.

New Hire Training

Training is scheduled to start in February 2018 for New Hires. QPE has three distinct tracts that New Hire trainees may select. The CNC Machinist/CNC Operator, the CAD/CAM Operator and the Quality Control (QC) Inspector programs are, at a minimum, 400 hours long over 12 weeks. Depending on need, trainees may take additional courses to further upgrade skills with longer programs of 630 hours over 18 weeks or 1,030 hours over 30 weeks. The length of time each trainee remains in training will vary by student. All New Hire trainees will receive upwards of 400 hours of training, of which a maximum of 260 hours will be reimbursed by ETP.

Manufacturing Skills – This training will be provided to all occupations and includes topics such as Shop Math, Geometric Dimensioning & Tolerancing, CNC Set-Up & Operation, SPC, Introduction to CAD/CAM, and Fundamental Programming.

Computer Skills – This training will be provided to all occupations and will depend on the program trainee's choose. These topics will be in-depth technical skills provided to assist trainees in employment placement. Topics will include: CNC Programming, Automation training, solid model creation, Coordinate Measuring Machine programming and others.

Marketing and Support Costs

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

QPE requests 8% support costs for program marketing and training-related activities including the recruitment of additional participating employers, employer training assessments for retrainees as well as identifying job opening and placements for new hires. Staff recommends the 8% support costs.

Substantial Contribution

QPE serves large and small companies, some of which may have received training in prior ETP contracts. If a large participating employer has received the benefit of training with payment earned in excess of $250,000 within the past five years, reimbursement for trainees at the same facility will be reduced by 15% to reflect a substantial contribution to the cost of training. Funding for any participating employer previously 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.

Commitment to Training

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

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

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

Project Administration

QPE has two internal staff members dedicated to project administration/training infrastructure. Their duties include new hire trainee recruitment; trainee/participating employers needs assessments, and enrolling and tracking trainees in ETP's on line systems. These two staff members will work with New Hires on employment placement services as well.

High Unemployment Area

Trainees in all job numbers may work in a High Unemployment Area (HUA) with unemployment exceeding the state average by at least 25%. However, QPE is not asking for a wage or retention modification.

Training Agency Certification

QPE is eligible as a training agency via BPPE licensure, valid until January 21, 2020.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET16-0175	Anaheim	10/12/15 – 10/11/17	$214,537	$193,073 (90%)
ET13-0376	Anaheim	6/3/13 – 6/2/15	$214,440	$179,691 (84%)
ET11-0227	Anaheim	6/7/11 – 6/6/13	$178,454	$165,755 (93%)

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

N/A

Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 200 (Job Numbers 1)
8 – 60 (Job Number 2)
8 – 260 (Job Number 3)   Trainees may receive any of the following:

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

ADVANCED TECHNOLOGY (Job Numbers 1 & 2 Only)
- Advanced programming Techniques
- Introduction to 3D wire frame
- Geometry Creation in CAD/CAM
- Posting CNC Programs
- Advanced Production Milling
- Advanced Production Lathe
- Solid Surfacing
- 4th & 5th Axis Milling
- Swiss CNC Lathe
- Solid Model Creation
- Solid Imports
- Advanced Geometric Dimensioning & Tolerancing
- Advanced 3D Math applications
- Coordinate Measuring Machine Programming
- Rapid Prototyping
- MACRO "FANUC B" CNC Programming
- Composite Modeling (Advanced Materials)
- Composite Machining (Advanced Materials)
- Programmable Logic Controllers (Automation
- Stepper and Servo Motor Control (Automation)
- PLC Applications Logic Controllers (Automation)

COMPUTER SKILLS (Job Number 3 Only)
- Advanced programming Techniques
- Introduction to 3D wire frame
- Geometry Creation in CAD/CAM
- Posting CNC Programs
- Advanced Production Milling

- Advanced Production Lathe
- Solid Surfacing
- 4th & 5th Axis Milling
- Swiss CNC Lathe
- Solid Model Creation
- Solid Imports
- Advanced Geometric Dimensioning & Tolerancing
- Advanced 3D Math applications
- Coordinate Measuring Machine Programming
- Rapid Prototyping
- MACRO "FANUC B" CNC Programming
- Composite Modeling (Advanced Materials)
- Composite Machining (Advanced Materials)
- Programmable Logic Controllers (Automation
- Stepper and Servo Motor Control (Automation)
- PLC Applications Logic Controllers (Automation)

Note: Reimbursement for retraining is capped at 200 total training hours per trainee for Job Number 1, and 60 total training hours per trainee for Job Number 2 regardless of the method of delivery. Reimbursement for new hire training in Job Number 3 is capped at 260 total training hours per trainee.

Participating Employers in Retrainee
Multiple Employer Contracts

Contractor's Name: QPE Technical Institute, Inc.   CCG No.: ET18-0161

Reference No: 18-0021   Page 1 of 4

Company: Aerofit, LLC

Address: 1425 S. Acacia

City, State, Zip: Fullerton, CA 92831

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 40

Total # of full-time company employees worldwide: 180

Total # of full-time company employees in California: 180

Company: American Innovative Products

Address: 1525 N. Endeavor Lane Suite # H

City, State, Zip: Anaheim, CA

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 18

Total # of full-time company employees in California: 18

Company: California Vibratory Feeders

Address: 1725 Orangethorpe Park

City, State, Zip: Anaheim, CA 92801

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

Company: Canyon Composites

Address: 1548 N. Gemini Place

City, State, Zip: Anaheim, CA 92801

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 50

Total # of full-time company employees in California: 50

ETP 100B (1/09)

Participating Employers in Retrainee Multiple Employer Contracts

Company: D & B Fabrication Plus, Inc.

Address: 4130 Flat Rock Dr. Suite #110

City, State, Zip: Riverside, CA 92505

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 13

Total # of full-time company employees in California: 13

Company: Egge Machine Company

Address: 11707 Slauson Ave.

City, State, Zip: Santa Fe Springs, CA 90670

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 4

Total # of full-time company employees worldwide: 23

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

Company: Leeper Manufacturing

Address: 2560 E. Fender #C

City, State, Zip: Fullerton, CA 92831

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 15

Total # of full-time company employees worldwide: 35

Total # of full-time company employees in California: 35

Company: Nobel BioCare USA, LLC

Address: 22715 Savi Ranch pkwy

City, State, Zip: Yorba Linda, CA 92887

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: 2500

Contractor's Name: QPE Technical Institute, Inc.   CCG No.: ET18-0161

Reference No: 18-0021   Page 3 of 4

Company: Premier Gear & Machining Inc..

Address: 14771 2360 Pomona Rincon Rd.

City, State, Zip: Corona, CA 92880

Collective Bargaining Agreement(s):

Estimated # of employees to be retrained under this Agreement: 7

Total # of full-time company employees worldwide: 24

Total # of full-time company employees in California: 24

Company: Protool Co.

Address: 14771 Myford Rd. Suite #D

City, State, Zip: Tustin, CA 92780

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 23

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

Company: Reliant Aerospace Structures

Address: 1040 N. Batavia St. Unit A

City, State, Zip: Orange, CA 92867

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement 15

Total # of full-time company employees worldwide: 18

Total # of full-time company employees in California 18

Company: SchoGo Engineered Products

Address: 210 Benjamin Drive

City, State, Zip: Corona, CA 92879

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 16

Total # of full-time company employees in California 16

Company: Wavefront Technology, Inc.

ETP 100B (1/09)

Participating Employers in Retrainee
Multiple Employer Contracts

Address: 7350 Somerset Blvd.

City, State, Zip: Paramount, CA 90723

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 72

Total # of full-time company employees in California 72

Training Proposal for:

Santa Ana Chamber of Commerce

Agreement Number: ET18-0157

Panel Meeting of: January 24, 2018

ETP Regional Office: San Diego   **Analyst:** M. Ibarra

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate SB <100 HUA	Industry Sector(s):	Manufacturing Aerospace and Defense Technology/IT Technology/Other Priority Industry: ☒ Yes ☐ No
Counties Served:	Statewide	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☐ Yes ☒ No		
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		≤20%	

FUNDING DETAIL:

Program Costs	+	**Support Costs**	=	**Total ETP Funding**
$887,800		$61,551 8%		$949,351

In-Kind Contribution:	50% of Total ETP Funding Required	$478,560

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours Class / Lab	Range of Hours CBT	Average Cost per Trainee	Post-Retention Wage
1	Retrainee SB <100 Priority Rate	Continuous Impr, Computer Skills	179	8 - 200	0	$2,780	$16.70
				Weighted Avg: 100			
2	Retrainee SB<100	Continuous Impr, Computer Skills	27	8 - 200	0	$2,353	16.70
				Weighted Avg: 100			
3	Retrainee Priority Rate	Continuous Impr, Computer Skills	160	8 - 200	0	$1,925	$16.70
				Weighted Avg: 100			
4	Retrainee	Continuous Impr, Computer Skills	50	8 - 200	0	$1,604	$16.70
				Weighted Avg: 100			

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

Minimum Wage by County: $18.22 per hour for Alameda, Contra Costa, Marin, San Francisco, San Mateo, and Santa Clara Counties; $17.54 per hour for Los Angeles County; $17.50 per hour for Orange County; $17.03 per hour for San Diego County; $16.80 per hour for Sacramento County; $16.70 per hour for all other Counties.

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

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

Participating employers may use up to $2.50 of health benefits to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Technical Analyst, PC/Hardware Technician, Sales Representative, Account Representative, Manufacturing Frontline Staff, Repair Technician, Shipping and Receiving, Warehouse Control, Purchasing Assistant, Administrative Support		50
System Analyst, System Administrator, Quality Inspector		91
Programmer Analyst		41
Network Engineer, Network Administrator, Network Architect		80
Database Administrator, Database Architect		45
Application Architect		48
Manager/Supervisor		61

INTRODUCTION

This is the tenth proposal for the Santa Ana Chamber of Commerce (SACC or Chamber), (www.santaanachamber.com) and the sixth in the last five years.

Founded in 1889, the Chamber brings together a broad representation of business, government, non-profit, and education entities that work together on its board of directors, councils, committees, and task forces to identify and implement programs to improve the economy in Santa Ana and surrounding areas. Workforce development is one area of focus for the Chamber. Developing the local workforce involves linking skill-training programs to current employer demands.

For 13 years, the Chamber has offered ETP-funded training in IT (Computer Skills) to small, medium, and large technology companies across California. In the beginning, its agreements focused on companies in the greater Orange County area. However, in recent years, SACC began training employees of these companies who are located outside Orange County with the same training needs.

Recently in 2015, in addition to IT training, SACC started offering quality management, business and skill development, International Standards Organization (ISO), and aerospace standards training to manufacturing, warehousing, and defense companies in the Orange, Los Angeles, Riverside, and San Bernardino Counties area.

PROJECT DETAILS

Employer Demand

The Chamber intends to bring ETP-funded training to multi-industry businesses. It will market to businesses with a need for computer skills or continuous improvement training. Some of SACC's participating core group of employers indicated a substantial need for computer skills training due to constant and rapid changes in technology. Employers need IT workers with current technical skills to remain competitive. To this end, these core group of employers must streamline and automate business functions by implementing higher capacity computer networks. Specifically, companies must implement new technologies such as mobile computing and cloud computing and virtualization to improve productivity while lowering IT infrastructure costs.

Similarly, SACC's participating core group employers in the manufacturing, aerospace and defense, and technology sectors have a growing demand for quality management and business skills development training. Training is specific to the needs of these industries to keep pace with updated standards and regulations as well as improve processes for quality products. Training in specific coursework will be offered in Lean Manufacturing and Six Sigma. Some training courses will lead to ISO certification which is designed to improve quality management systems to meet customer requirements. Training will also include industry certification upgrade training.

Core Group of Employers

In this proposal, all participating employers in the core group have been screened for ETP eligibility, including substantial contribution. These employers have also been determined to meet out-of-state competition standards.

The Chamber has requested ETP funding for 416 trainees and has current core group demand for 344 trainees (83%). The core group of employers consists of 11 employers: 5 small businesses (44%) and 6 large employers (56%) across Northern and Southern California. Nine of the eleven employers belong to priority industries.

Training Plan

SACC estimates 50% of the training will be delivered in Computer Skills to IT workers delivered via e-learning (Virtual Classroom). The other 50% of the training will be delivered in Continuous Improvement Skills and delivered at the participating employer work sites via class/lab.

Computer Skills (50%) – Training will be provided primarily to IT occupations including System Analyst, System Administrator, Programmer Analyst, Network Engineer, Network Administrator, Network Architect, Database Administrator, Database Architect, and Application Architect. Training courses include various aspects of software development, system/network administration, security administration, and cloud computing technologies. The proposed curriculum has been designed for advanced IT professionals who work in the areas of programming, system/network administration, and database design/administration.

Computer skills training will be provided using online meeting software to deliver live, instructor-led e-learning training via the Internet. Classes are comprised of formal lecture and instruction, demonstrations, and interactive hands-on laboratory exercises under the guidance of a live instructor. Trainees access lab servers over the Internet to interactively complete the lab exercises. If trainees have questions while doing lab exercises, they can talk to and invite the instructor to view their computer screen remotely and provide assistance. Instructors can project screens to the rest of the class to share knowledge and enhance the learning experience.

Continuous Improvement (50%) – Training will be offered to all occupations in Administrative Support, Manager/Supervisor, Shipping and Receiving, Manufacturing, Warehouse, and Purchasing. Training topics include various International Organization for Standardization (ISO) and other quality system requirements such as AS9100, AS 9110, and AS9120 to help companies obtain or maintain certifications. Training will also include Lean Methodology, Change Management, Six Sigma, Building High Performance Teams, and Problem Solving Skills.

Training Subcontractor

The proposed training will be delivered by two training vendors: Saisoft and Lean QA. Reimbursement shall not be earned for training hours delivered by any single private-sector training vendor in excess of 50% of total training hours.

Saisoft specializes in Computer Skills training in the latest technologies for IT workers. Since 2003, Saisoft has offered training in software development, system administration, network administration, database administration, and cloud computing. Instructors are highly experienced with 10-15 years of practical industry experience, bringing "real world" perspective to the classroom. The subcontractor's training classes provide students with highly technical skills needed to be successful as application developers as well as system, network, and database administrators. Saisoft's training classes are also designed to prepare students for industry standard IT certification exams.

Lean QA has provided Continuous Improvement training for companies across Southern California for 11 years and is projected to provide the proposed Continuous Improvement training. Lean QA has helped over 60 companies with training and maintained their training relationships over time. Its training promotes strategies and techniques from different industries to provide customers a new perspective to continually improve their organization. Lean QA also set measurement and follow up systems to ensure trainees are successful in their job functions and to establish process improvement culture within the organization.

Curriculum Development

At the start of employer recruitment process, participating employers will complete a training needs assessment and survey to identify critical skill deficits, new technologies, and current business challenges. These assessments are used to design customized course content and specific training plans for each employer. At the end of this program, trainees will complete a survey or course evaluation on the quality and relevance of the training. Additionally, employers will be surveyed to assess the overall effectiveness of the training program.

Marketing and Support Costs

SACC reports that it has an extensive database of businesses in IT, software, electronics manufacturing and associated industries. To reach these businesses, SACC staff will continue to market via the Chamber's website; quarterly e-mails to member companies; trade shows; job fairs; direct mail; in-person visits; web-based seminars and meetings; and Chamber events.

SACC will perform marketing and supportive services for companies located in Santa Ana and neighboring communities. Saisoft will perform marketing specifically to IT companies across California and Lean QA will assist in marketing to companies in Southern California.

SACC requests 8% support to cover costs of intensive outreach efforts required to market and recruit additional participating employers, assess specific training needs, develop job-specific curricula and training schedules, and conduct necessary follow-up during retention. This will be an on-going activity throughout the duration of the Agreement. Staff recommends the 8% support costs.

Commitment to Training

SACC represents that training funded under this proposal is supplemental and that ETP funds will not displace the existing financial commitment to training by participating employers. Safety training is provided by the participating employers in accordance with all pertinent requirements under state and federal law.

The Chamber's participating core group of employers stated that the proposed ETP training is supplementary in nature. Current and on-going training varies by employer but generally consists of new-hire orientation, job-specific on-the-job training, product training, soft skills training, and safety training.

ETP funds are intended to provide supplemental training for companies that lack the training budget or resources but need training to upgrade the job skills to keep the workforce competitive. For large employers, although they have training programs, they are unable to keep up with the amount and frequency of technical training needed to remain competitive. Small businesses are not able to provide significant training to their employees due to lack of training funds. ETP funding will allow participating employers the opportunity to upgrade workers' skills in the latest technologies and certifications. The core group of employers has certified that they will continue to provide training to their employees after the completion of ETP-funded training.

➢ **Training Infrastructure**

The SACC Vice President of Operations and staff will oversee and manage this training project including maintaining all class/lab attendance rosters for Continuous Improvement training at the Chamber headquarters in Santa Ana. Additionally, the Chamber will provide ETP project administrative functions of enrolling trainees and tracking all Continuous Improvement training

classes in the ETP On-line Systems. The training vendor, Lean QA, will assist SACC in gathering completed rosters from participating employers for the Continuous Improvement training classes.

The training vendor, Saisoft, will provide the ETP administrative services for the Computer Skills training classes including enrolling and tracking of all trainees in the ETP on line systems. The reimbursement to each training vendor for ETP administrative services will be proportional to the activities stated above (see Administrative Services below).

Recordkeeping

SACC will utilize an electronic recordkeeping system for all Computer Skills training that is designed and programmed to document the E-Learning (Virtual classroom) method of class/lab training. This system has been reviewed and approved by ETP staff.

For Continuous Improvement training, SACC will utilize standard paper-based attendance rosters.

Tuition Reimbursement

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

Substantial Contribution

SACC serves large and small companies, some of which may have received training in prior ETP contracts. If a large participating employer has received the benefit of training with payment earned in excess of $250,000 within the past five years, reimbursement for trainees at the same facility will be reduced by 15% to reflect a substantial contribution to the cost of training. Funding for any participating employer previously assessed a substantial contribution will be reduced by 30%. Small businesses with 100 or fewer full-time employees are not subject to this provision.

High Unemployment Area

Although there may be participating employers located in a HUA, SACC is not asking for a wage or retention modification.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0269	$949,391	11/7/2016–11/6/2018	638	573	0*

All training ended on 9/27/17. As of 12/15/17, 573 trainees have completed retention for projected earnings of $746,920 (placements in review). SACC tracked over 41,281 reimbursable training hours, more than the Agreement amount. After the end of retention, the Contractor projects final earnings of 100%. SACC plans to submit the final invoice closeout when all trainees complete retention (12/27/17).

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET15-0310	Statewide	1/5/15 – 1/4/17	$948,384	$937,147 (99%)
ET14-0101	Statewide	9/03/13 – 9/02/15	$1,249,634	$1,249,634 (100%)
ET12-0241	Statewide	12/31/11-12/30/13	$748,622	$744,418 (99%)
ET11-0215	Statewide	4/04/11-4/03/13	$399,590	$392,375 (98%)

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

Saisoft in Irvine will perform some administrative services for an amount not to exceed 3.7% of payment earned. Lean QA in Diamond Bar will also perform some administrative services for an amount not to exceed 2.7% of payment earned.

TRAINING VENDORS

Saisoft in Irvine has been retained to provide Computer Skills.

Lean QA, in Diamond Bar, has also been retained to provide Continuous Improvement training.

Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 200   Trainees may receive any of the following:

CONTINUOUS IMPROVEMENT
Quality Management Skills
ISO9001
AS9100
AS9110
AS9120
ISO13485
TS16949
ISO22000
ISO14001
Safe Quality Food Procedures
National Aerospace and Defense Contractors Accreditation Program (NADCAP)
Business Skills Development
International Traffic in Arms Regulations (ITAR)
Lean Methodology
Change Management
Six Sigma White Belt
Six Sigma Green Belt
Six Sigma Black Belt
Continuous Improvement Skills
Kaizen
Internal Auditor
Inventory Management
Supply Chain Management
Foreign Object Debris (FOD) Prevention
Building High Performance Teams
Problem Solving/Root Cause Analysis

E-Learning Hours

8 – 200

COMPUTER SKILLS
DAT-ESI: Data Science Essentials
DAT-SC1: Introduction to Data Science
WIR-TS: Wireless Technology Specialist (CWTS)
PMI-ACP: Software Development Lifecycle Agile Review (PMI-ACP)
AGL-TS: Agile Software Testing Techniques
PUP-INT: Managing Virtual Infrastructure using Puppet
PEN-KAL: Penetration Testing with Kali Linux
DEV-OPS: DevOps Practitioner Certification
CIS-AC1: Computer Information Systems Auditor (CISA)
R-PR: Programming with R
FSD-JVS: Development with Javascript
AGL-SC: Agile and Scrum Software Development Methodology

AND-PR: Android Programming
Apache Web Server Administration
AWS-CC: Cloud computing with Amazon Web Services
BUS-AN: Business Analysis and Modeling
BUS-AN2: Business Analysis for Object Oriented Design
CAP-P1: Computer Systems Authorization Protocol
CEH-P1: Certified Ethical Hacking Training
CGI (Common Gateway Interface) and PHP (Hypertext Preprocessor) Programming
CIS-AC1: Computer Systems Information Auditor (CISA)
CIS-ML: Configuring Multi-layer Switched Cisco Networks
CIS-ML: Configuring Multi-layer Switched Cisco Networks
CIS-ND1: Configuring Cisco Network Devices I (ICND1 – 640-822)
CIS-ND2: Configuring Cisco Network Devices II (ICND2 - 640-816)
CIS-NPR: Cisco CCNP ROUTE (642-902)
CIS-NPR: Cisco CCNP Routing and Switching
CIS-NPS: Cisco CCNP SWITCH (642-813)
CIS-NPT: Cisco CCNP TSHOOT (642-832)
CIS-RA: Configuring Remote Access Cisco Networks
CIS-SC: Configuring scalable Cisco Networks
CIS-SEC: Securing Cisco Network Devices
CIS-SP1:Computer Information Systems Security Protocol
CIS-TA: Troubleshooting Advanced Cisco Networks
CIT-SA: Citrix Presentation Server Administration
CIT-XA: Citrix XenApp Implementation
CMP-CL1: Comptia Cloud Essentials (CLO-001)
CMP-MOB: Comptia Mobility+ (MBO-001)
CMP-SM: Comptia Social Media Security
CMP-SR1: Comptia Server+ (SKO-003)
COB-IT: Control Objectives for Information and Related Technology (COBIT)
Foundation
COG-PR1: Implementing Business Intelligence with Cognos
CPT-NW: Comptia Network+
CPT-SC: Comptia Security+
CRY-RP: Programming SAP Crystal Reports
CSP-AS: Programming ASP.NET and ADO.NET using C#
CSP-EN: Enterprise Application Development in C#
CSP-PR: Programming in C#
DAT-ESI: Data Science Essentials
DAT-SC: Introduction to Data Science
DDT-DM: Data Modeling and Database Design
DDT-LP: Logical and Physical Data Modeling
DEV-OPS: DevOps Practitioner Certification
DIG-MA1: Digital Marketing (SEO, SEM and SMM)
DIS-R1: Disaster Recovery for Information Technology
DMS-EO: Search Engine Optimization Technologies
DMS-MA1: Digital Marketing Fundamentals

DWH-IN1: Data Warehousing Fundamentals
DWH-IN2: Programming Informatica
FCB-AD: Facebook Ads Manager Administration
FSD-JVS: Fullstack development with Javascript
GGL-GL: Google Glass Application Development
GOO-AD: Google Adwords Administration
GOO-AN: Implementing Google Analytics
HAD-DB1: Big Data Management with Hadoop
Information Technology Infrastructure Library (ITIL) Best Practices
Information Technology Infrastructure Library (ITIL) Implementation
IPH-PR: iPhone Programming
JAV-AP: Application Development in Java
JAV-AT: Advanced Topics in Java
JAV-OO: Object Oriented Programming in Java
JAV-TA: Automated Test Framework Development In Java
JUN-PR: Introduction to Juniper Network Devices
JVS-PR: Javascript Programming
LIN-AD: Linkedin AdManager Administration
LIN-NA: Linux Network Administration
LIN-SA: Linux System Administration
LIN-SH: Linux Shell Scripting
LIN-WI: Linux for Windows users
MON-DB1: Big Data Management with MongoDB
MPM-PR: Multi-platform Mobile Development
MSF-410: Installing and configuring Windows Server 2012
MSF-411: Administering Windows Server 2012
MSF-412: Configuring Advanced Windows Server 2012 Services
MSF-413: Designing and Implementing Windows Server 2012 Infrastructure
MSF-AC: Microsoft Access Programming
MSF-AD12: MS Windows Server 2012 Active Directory Services
MSF-AD8: Microsoft Windows 2008 Active Directory
MSF-AZ: Microsoft Azure Infrastructure Solutions
MSF-BG: Microsoft Bing Adcenter Administration
MSF-EX: Microsoft Exchange Server Administration
MSF-FN: Windows Server Administration Fundamentals
MSF-HY: Microsoft Windows Server Hyper-V Administration
MSF-IIS: Administering Microsoft Internet Information Server (IIS)
MSF-NA8: Microsoft Windows 2008 Network Infrastructure
MSF-PS: MS Windows Administration with Powershell
MSF-SA8: Microsoft Windows 2008 Server Administration
MSF-SEC: Designing Security for Microsoft Networks
MSF-SP: Microsoft Sharepoint Server Administration
MSF-SPA: Microsoft Sharepoint Foundation Administration
MSF-SPB: Microsoft Sharepoint Business Intelligence
MSF-SPD: Microsoft Sharepoint Development
MSF-SPF: Microsoft Sharepoint Foundation

MSF-SPS: Microsoft Sharepoint Designer
MSF-VS: Microsoft Visio
MSF-IIS: Administering Microsoft Internet Information Server (IIS)
MSF-W10: Installing and configuring Windows 10
MSF-W7: Microsoft Windows10 Administration
MSO-365: Migrating Exchange Server to MS Office 365
MSW-AZ: Implementing Microsoft SQL Azure
MySQL Database Administration
NET-FN: Networking Fundamentals
Network Security – Applied Computer Forensics
Network Security – Ethical Hacking
NJS-PR1: Node.js Programming
OOD-UML: Object Oriented Design and Unified Modeling Language
ORA-DB: Oracle Database Administration
ORA-PL: Oracle – PL/SQL (Programming Language in SQL)
ORA-SQ: Oracle – SQL (Structured Query Language)
PEN-KAL: Penetration Testing with Kali Linux
Perl Advanced Topics: Serving pages using HTTPS (Secure Hypertext Protocol) with mod_ssl
Perl Programming
PHP-PR: Programming in PHP
PMT-13: Project Management using Microsoft Project 2013
PMT-IT: Software Development Lifecycle (SDLC) Information Technology Infrastructure Library - ITIL
PMT-SD: Information Technology Project Management
PMT: Software Development Lifecycle (SDLC) Project Management
PRL-PR: Programming in Perl
PUP-INT: Managing Virtual Infrastructure using Puppet
PYT-PR: Programming in Python
QCB-A1: QuickBooks Training
R-PR: Programming in R
RUB-PR1: Programming in Ruby
RUB-PR2: Ruby on Rails
SAI-464: Developing Microsoft SQL Server Databases
SAI-465: Designing Database Solutions for SQL Server
SAI-466: Implementing Data Models and Reports with Microsoft SQL Server
SAI-467: Designing Business Intelligence Solutions with Microsoft SQL Server
SEC-AI: Designing Security Architecture Infrastructures
SEC-AP: Application, Operational and Organizational Security (Security+ 2)
SEC-MA: Designing Security Management Infrastructures
SEC-NI: Securing Network Infrastructure and Communications (Security+ 1)
SEL-PR: Automated Testing using Selenium
Software Development Lifecycle (SDLC) Agile Review
Software Development Lifecycle (SDLC) Process Review
Software Development Lifecycle (SDLC) Six Sigma Quality Best Practices
SQL-461: Querying Microsoft SQL Server

SQL-462: Administering Microsoft SQL Server Databases
SQL-463: Implementing a Data Warehouse with Microsoft SQL Server
SQL-AD: SQL Server Advanced Topics
SQL-AS12: SQL Server Analysis Services
SQL-BI: SQL Server Business Intelligence
SQL-BID: SQL Server Designing Business Intelligence Solutions
SQL-DB: SQL Server Database Design
SQL-MD12: SQL Server Multi-dimensional Expressions and Data Analysis
Expressions
SQL-RS: SQL Server Reporting Services
SQL-SA: SQL Server Database Administration
SQL-TS: Programming SQL Server with Transact-SQL
SWF-PR1: Apple Swift Programming
TBL-MS: Mastering Tableau Software for Data Science
TBL-RP: Reporting with Tableau Software
UBU-DS: Ubuntu Linux Desktop Administration
UFT-PR: Automated Testing using UFT (Unified Testing Framework)
VBS-AS: Programming ASP.NET and ADO.NET using VB.NET
VBS-EN: Enterprise Application Development in VB.NET
VBS-PR: Programming in VB.NET
VMW-AD: VMWare Infrastructure Administration
WIR-NA Wireless Network Administration
WIR-TN: Troubleshooting Networking with Wireshark software
WIR-TS: Wireless Technology Specialist
WRD-PR: Website design with Wordpress
PMT-SK: Project Management Skills
PMT-MP: Project Management using MS Project

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: Santa Ana Chamber of Commerce   CCG No.: ET18-0157

Reference No: 18-0035   Page: 1 of 3

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Boyett Petroleum

Address: 601 McHenry Ave.

City, State, Zip: Modesto, CA 95350

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 61

Total # of full-time company employees in California: 54

Company: California Screw Products

Address: 14957 Gwenchris Court

City, State, Zip: Paramount, CA 90723

Collective Bargaining Agreement(s): No

Estimated #of employees to be retrained under this Agreement: 54

Total # of full-time company employees worldwide: 54

Total # of full-time company employees in California: 54

Company: Greenwave Reality Inc.

Address: 200 Spectrum Center Drive, 15th Floor

City, State, Zip: Irvine, CA 92618

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 257

Total # of full-time company employees in California: 100

Company: Hyundai Autoever Telematics America, Inc

Address: 10550 Talbert Ave

City, State, Zip: Fountain Valley, CA 92708

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 40

Total # of full-time company employees worldwide: 57

Total # of full-time company employees in California: 57

Participating Employers in Retrainee
Multiple Employer Contracts

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Intelliswift Software, Inc

Address: 39600 Balentine Dr #200

City, State, Zip: Newark, CA 94560

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 86

Total # of full-time company employees worldwide: 800

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

Company: OPSWAT Inc.

Address: 398 Kansas St

City, State, Zip: San Francisco, CA 94103

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 4

Total # of full-time company employees worldwide: 156

Total # of full-time company employees in California: 142

Company: Rubbercraft

Address: 3701 Conant St.

City, State, Zip: Long Beach, CA 90808

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 190

Total # of full-time company employees in California: 190

Company: UL Verification Services

Address: 709 Fiero Ln, Suite 25

City, State, Zip: San Luis Obispo, CA 93401

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 9,649

Total # of full-time company employees in California: 2,263

ETP 100B (1/09)

Participating Employers in Retrainee
Multiple Employer Contracts

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Ventegra LLC

Address: 450 N Brand Blvd #600

City, State, Zip: Glendale, CA 91230

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 45

Total # of full-time company employees in California: 32

Company: Zestfinance Inc

Address: 1377 N Serrano Ave

City, State, Zip: Los Angeles, CA 90027

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 95

Total # of full-time company employees in California: 80

Company: Zodiac Aerospace

Address: 9671 Irvine Center Dr.

City, State, Zip: Irvine, CA 92618

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 35

Total # of full-time company employees worldwide: 30,000

Total # of full-time company employees in California: 800

STATE OF CALIFORNIA

ETP

EMPLOYMENT
TRAINING PANEL

Amendment Proposal #1 for:

Murrieta Chamber of Commerce

Agreement Number: ET17-0442

Amendment Effective Date: January 25, 2018

Panel Meeting of: January 24, 2018

ETP Regional Office: San Diego   **Analyst:** H. Bernard

CURRENT PROJECT PROFILE

Contract Type:	Priority/Retrainee SB<100 HUA
Industry Sector(s):	Manufacturing Goods Movement Transportation/Logistics Aerospace and Defense Wholesale Trade
Counties Served:	Riverside, San Bernardino, San Diego, Orange, Los Angeles
Repeat Contractor:	☒ Yes ☐ No
Union(s):	☒ Yes ☐ No
Priority Industry:	☒ Yes ☐ No

Current Contract Term: April 3, 2017 to April 2, 2019

Current Funding	In-Kind Contribution
$499,602	$438,000

AMENDMENT FUNDING

Requested Funding	Support Costs	Amendment Funding	In-Kind Contribution
+$223,200	+$15,450	+$238,650	+$238,000

Total Funding
$738,252

AMENDMENT TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours Class / Lab	CBT	Average Cost per Trainee	Post-Retention Wage
1	Priority Rate Retrainee	Cont. Imp., Business Skills, Computer Skills, Mfgt. Skills	271	8-200 Weighted Avg: 48	0	$924	$16.16
2	Retrainee	Cont. Imp., Business Skills, Computer Skills, Mfgt. Skills	10	8-200 Weighted Avg: 40	0	$641	$16.16
3	Priority Rate SB<100	Cont. Imp., Business Skills, Computer Skills, Mfgt. Skills	182	8-200 Weighted Avg: 48	0	$1,334	$16.16
4	**Phase II Priority Rate Retrainee**	**Cont. Imp., Business Skills, Computer Skills, Mfgt. Skills**	**150**	**8-200 Weighted Avg: 48**	**0**	**$924**	**$16.70**
5	**Phase II Priority Rate SB<100**	**Cont. Imp., Business Skills, Computer Skills, Mfgt. Skills**	**75**	**8-200 Weighted Avg: 48**	**0**	**$1,334**	**$16.70**

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

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

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

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

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

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

INTRODUCTION

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

The Agreement was approved at the March 24, 2017 Panel meeting and training commenced April 13, 2017. It focuses on training some 463 workers from priority and non-priority industries, small and large businesses in Southern California.

AMENDMENT DETAILS

Employer Demand

Murrieta Chamber reports that 317 retrainees have started training to date, from priority-industry employers. The Chamber has documented the delivery of training hours sufficient to support payment earned at 90% of the Agreement amount. More priority industry employers are requesting training, but there is not enough funding available to meet this demand.

Therefore, Murrieta Chamber requests a Phase II amendment to add funds under new Job Number 4 (large employers) and Job Number 5 (small businesses). ETP staff verified that there is an immediate training demand to support this request and sufficient time remaining in the term of contract for training (eight-month training period, three-month retention period).

The Curriculum will not change, and will remain as originally approved for: Computer Skills (Quickbooks, Microsoft); Continuous Improvement (Quality Engineering, Lean and Six Sigma); and Business Skills (Customer Service, Communication Skills); Manufacturing Skills (Blueprint Reading and Inventory Management). All training will continue to be customized based on individual employer assessments.

Phase II training will begin upon Panel approval. As amended, the contract will still be within the FY 2016/17 funding limitations. Phase II job numbers will have post-retention wages consistent with the 2018 calendar year. Any trainees who participated under Phase I will complete a 90-day retention period prior to being enrolled in a Phase II Job Number. No trainee will receive more than 200 training hours total.

Employer Core Group/Support Costs

The Phase II core group of participating employers consists of two priority-industry Small Businesses and one large business. Two employers are new to the Agreement and one has expressed a need for additional training under this Agreement. As such, the employer demand represents at least 80% of the requested Phase II training. Murrieta Chamber will continue to recruit employers and assess employer-specific job training requirements throughout the term of the project; the goal is to focus on priority industries and small businesses. Due to the intensive outreach efforts required to market the program, Murrieta Chamber requests and ETP staff recommends 8% support costs.

MEC Broker Model

Murrieta Chamber will utilize two training vendors to perform training under this amendment. It represents that no more than 50% of the training hours will be delivered by Custom Corporate Communications for approximately $95,460. Another 50% of the training will be provided by Western Training Group for approximately $95,460.

Summary of Amendment Changes:

1. Add Phase II of training;
2. Increase the Agreement amount by $238,650 (from $499,602 to $738,252);
3. Increase the average number of trainees by 225 (from 463 to 688) in Job Numbers 4-5.

RECOMMENDATION

Staff recommends approval of this Amendment.

CURRENT CONTRACT PERFORMANCE

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

Agreement No.	Approved Amount	Term	No. Trainees (Average)	No. Completed Training	No. Retained
ET17-0442	$499,602	4/3/17 – 4/2/19	463	83	0

As of 12/15/17, the ETP tracking system reflects that Murrieta Chamber has documented 19,808 reimbursable training hours for 317 trainees, a potential earning of $420,224 (84% of the Agreement amount). Of the 317 active trainees, 83 have completed training and the 90-day retention period.

Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 200   Trainees may receive any of the following:

CONTINUOUS IMPROVEMENT
- ISO Auditor Training
- Quality Engineering
- Six Sigma
- Statistical Process Control Team Building
- Lean Enterprise:
    - Lean Manufacturing
    - Lean Office
    - Kaizen 7S
    - Process Improvement & Process Mapping
    - Problem Solving & Root Cause Analysis
    - Set-Up Time Reduction
- Leadership Skills:
    - Finance for Non-Finance People
    - Goal Setting/Time and Priority Management
    - Managing Change
    - Performance Management Skills
    - Team Building
- Project Management

BUSINESS SKILLS
- Business Writing Skills
- Communication Skills
- Customer Relations
- Sales Skills
- Social Media Marketing

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

MANUFACTURING SKILLS
- Advance Measurement Skills
- Inventory Management
- Electrical Fundamentals
- Blue Print Reading

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

Participating Employers in Retrainee
Multiple Employer Contracts

Contractor's Name: Murrieta Chamber of Commerce   CCG No.: ET17-0442

Reference No: Page 1 of 1

Company: Behr Paint Corporation

Address: 3400 W. Segerstrom Ave.

City State Zip: Santa Ana, CA 92704

Collective Bargaining Agreement(s): N/A

Estimated #of employees to be retrained under this Agreement: 100

Total # of full-time company employees worldwide: 3,300

Total # of full-time company employees in California: 600

Company: Price Products

Address: 106 State Place

City, State, Zip: Escondido, CA 92029

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 35

Total # of full-time company employees in California: 35

Company: Wilson Creek Winery

Address: 35960 Rancho California Road

City, State, Zip: Temecula, CA 92591

Collective Bargaining Agreement(s): N.A

Estimated #of employees to be retrained under this Agreement: 60

Total # of full-time company employees worldwide: 82

Total # of full-time company employees in California: 81

ETP 100B (1/09)

TRAINING PROPOSAL FOR

Altura Associates, Inc.

18-0507

Panel Meeting Date:	01/24/2018
Regional Office:	San Diego Regional Office
Analyst Name:	Cassandra Clady
Type of Proposal:	Single Employer (SB), Small Business Program
Funding Source:	Out-of-State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: $29,224.00			
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$29,224.00	N/A	$0.00	$51,806.70

APPLICANT PROFILE

Company Summary	Altura Associates, Inc. (Altura) is an engineering consulting that provides innovative energy efficiency and sustainability services for high performance buildings.

Industry Sector(s)	Professional, Scientific, and Technical		
Priority Industry	Yes		
No. Employees (Applicant)	**State:** 23	**US:** 23	**World Wide:** 23
Turnover Rate (Applicant)	0.00 %		
Repeat Contractor	No		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Training will ensure that staff are up-to-date on regulatory building codes, energy efficient building standards and software.

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	19	$26.00	56	$1,456	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	1	$26.00	60	$1,560	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 2013, Altura is an environmental engineering firm at the leading edge of environmental performance located in Irvine, CA. Staff combines expertise in mechanical/electrical engineering, energy management, environmental science and financial analysis to create environmentally efficient buildings. Altura customer base includes large commercial companies with significant real estate assets and large university campuses.

Training for this first-time ETP Contract will take place at Altura's sole location in Irvine.

2. Current Training Project Details

Purpose of Training	The environmental building industry is constantly changing and to provide quality services to its customers, Altura's staff must remain up-to-date with the latest software applications and technology. Altura averaged 45% growth rate over past four years and added several large clients. In addition, new environmental and building codes have recently been enacted. To keep up with industry conditions and business needs, Altura must provide training to all staff.
	Altura has created new technology and added new services related to implementing building automation system retrofits and creating Energy Management Information System software deployments. This expansion has been fueled by the introduction of new, open protocol networks for buildings and real estate properties.
	Training will provide staff with the technical skills to utilize these tools (Skypar, Niagara, AX SmartSheet, Microsoft office, and construction, and energy codes and regulations (Title 24, Cal Green.) Staff will also be trained in Business, Management, Commercial and Computer Skills to provide workers with the skills to deliver quality services.
	Additionally, training is needed for Altura Environmental Leadership Program. This program is designed to train key staff in environmental evaluation performance skills. These trainees will work with employees of major clients with over 500 individual buildings to ensure continued environmental performance in each of their respective buildings.
	Staff will also have Productive Lab (PL) training on various computer equipment. This training will help staff become more efficient with customers and ensure they are up-to-date with regulatory building codes and standards.

PROPOSED TRAINING PROJECT DETAILS

Training Infrastructure and Administrative Plan	Altura's President will oversee all administration and training. The Company has retained Welsh Advisor Inc. to assist with the administration of the project. 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 Business, Computer and Commercial Skills. Managers/Supervisors will receive Management Skills.	

Delivery Method/Level	**E-Learning - Instructor Led/Distance Learning**
Summary	
All occupations will receive training in Commercial skills on Safety Training for Construction Job sites.	

Delivery Method/Level	**Productive Laboratory**
Summary	
Productive Lab training will be provided to Senior Analysts, Director of Marketing and Operations in Computer and Commercial Skills.	

4. Additional Company or Training Project Details

Retrainee Job Creation

Altura averaged 45% growth rate over past four years as a result, the Company is expanding existing business by adding newly-hired employees to existing job functions. Alturas plan to add 2-3 employees every year for the next three years. The Company recently moved into a new office that has the space to accommodate this growth.

PROPOSED TRAINING PROJECT DETAILS

Altura has committed to hiring one new Engineer under this Contract (Group Number 2). The date-of-hire for all trainees in the job creation program will be within the three-month period before contract approval or within the term of the contract. The Company also represents that these trainees will be hired into "net new jobs" as a condition of employment.

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

Altura has retained the services of the following Subcontractor.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Welsh Advisors, Inc.	Anaheim	$1,901.90
Administrative	Welsh Advisors, Inc.	Anaheim	N/A
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 provide 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	Accounting & Financial Management Skills
	Business Planning and Organizing
	Business/Technical Writing Skills
	Marketing and Financial Management Skills
	Project Management Skills
	Time Management Skills
Commercial Skills (Standard)	Blue Print Readings and Schematics
	Build it Green -Certified Green Building Professional
	Building Performance Institute - Business Analyst
	Calcerts - Special Energy Programs
	CalGreen Training
	CxA Training Diagnostic Testing
	Designing & Costing Retrofit Scenarios with ROI Calculations
	LEED Building and Maintenance
	LEED Green Associate Credential
	Project Management
	The California Advanced Lighting Controls Training Program
	Title 24 Codes and Regulations
Computer Skills (Standard)	Axon Software Language
	Freshbooks Software
	Integrated System/Software
	Intermediate and Advanced Microsoft Office
	Niagara AX software
	Skyspark Software
	Smartsheet Software
Management Skills	Conflict Resolution
	Decision Making
	Leadership Skills
	Team Building

Delivery Method /Level	E-Learning – Instructor Led/Distance Learning
Training Type (Level)	**Planned Course Offerings**
Commercial Skills (Safety)	Safety Training for Construction Jobsites
Commercial Skills (Standard)	Webinars

Delivery Method /Level	Productive Laboratory
Training Type (Level)	**Planned Course Offerings**
Commercial Skills	Diagnosing Building Systems, Analyzing Energy Data
	Environmental Leadership Program
Computer Skills (Standard)	Freshbooks Software

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

	Integrated System Software
	Niagara AX Software
	Skyspark 1:1 Training
	Smartsheet Software

PL Justification and Details			
Explain the need for productive laboratory (PL) training	PL training is needed to keep Engineering staff (Analyst, Associate, Sr. Analyst, and Sr. Associate) informed of new environment and building codes recently enacted through formal classes - both on and off site. PL training will include Skypark analytic platform using information after off-site training. Up to 25 hours of PL training will be provided to Engineering Staff. 1:1 trainer-to-trainee ratio.		
Describe the Equipment/Processes to be used in delivering the PL training	Building energy controls and automation equipment, including servers, device-specific controllers, smart meters, sensors, and data-logging equipment; Software for programming building equipment, including SkySpark, Niagara AX, Axon, Smartsheet, and FIN; training on this equipment is necessary to perform service to improve energy efficiency of buildings and to integrate new technologies entering the marketplace.		
Describe Trainer Qualifications	The trainer is an expert in software systems and business accounting/ finance systems.		
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:

Bay Area Land Surveying, Inc.

Small Business

ET18-0154

Approval Date: December 11, 2017

ETP Regional Office: Sacramento   **Analyst:** K. Mam

CONTRACTOR

- Type of Industry: Services

                                                                    Priority Industry: ☒ Yes ☐ No

- Number of Full-Time Employees

                                   California: 14
                                   Worldwide: 14
                Number to be trained: 9
                                                                    Owner ☒ Yes ☐ No

- Out-of-State Competition: No OSC
- Special Employment Training (SET):   ☒ Yes ☐ No
- High Unemployment Area (HUA):   ☐ Yes ☒ No
- Turnover Rate: 5%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $9,360
- In-Kind Contribution: $14,700

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate SET SB<100	Computer Skills, Cont. Imp., Comm'l. Skills, PL-Comm'l. Skills	9	8-60 Weighted Avg: 40	0	$1,040	$22.04

- Reimbursement Rate: Job #1: $26 SB Priority

- County(ies):   Contra Costa

- Occupations to be Trained: Administrative Staff, Field Survey Technician, Office Survey Staff, Owner

- Union Representation: ☐ Yes

                                       ☒ No

- Health Benefits: Job #1: $1.54 per hour

SUBCONTRACTORS

- Development Services: N/A

- Administrative Services: N/A

- Training Vendors: N/A

OVERVIEW

Founded in 1994 and headquartered in Richmond, Bay Area Land Surveying, Inc. (BALS)(www.balsinc.net) provides land surveying services including boundary surveys, tract maps, condominium plans, building permit surveys, and boundary & topographic surveys to over 3,300 clients in the Bay Area. The Company's current business focus is subdivision, condominium, and construction related surveying. Training under this proposal will take place at the Company's sole location in Richmond.

Need for Training

This will be BALS' first ETP Agreement. BALS is experiencing a growth in business due to an increase in construction of subdivisions and condominiums in the Bay Area. The Company has recently invested in new surveying equipment such as GPS, Total Station Equipment, and Differential Levels that will provide for more efficiency. All surveying staff must train on the newly purchased equipment to ensure proper handling and usage.

Training increase employee skills in project research and planning, field project set-up and field surveying procedures. To improve these core skills, BALS will provide staff with in-depth training in construction staking, GPS reading and analysis, and understanding differential levels and error analysis. Improving staff's core skills as surveyors will allow BALS to provide clients with more accurate surveying and mapping for new construction. In addition, staff will be provided with AuotCAD software training to further refine surveying and mapping skills.

Training Plan

Training will be delivered via Classroom/Laboratory and Productive Lab methods by In-house experts and vendors as needed in the following:

Computer Skills: Training will be offered to all occupations. Training will focus on client management and the Company's surveying software. Training topics include Database and Website Management and AutoCAD.

Commercial Skills Training will be offered to Field and Office Survey Technicians. Training will focus on surveying equipment and field surveying. Training topics include Field Project Set-Up, GPS, and Field Survey Procedures Related to Construction Staking.

Continuous Improvement Training will be offered to all occupations. Training will focus on increasing customer satisfaction and process improvements. Training topics include Client Relationship Development and Project Management.

Productive Laboratory

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

Due to the nature of their services, certain training cannot be replicated in a class/lab environment. PL training is needed to provide staff real-time access to surveying equipment and procedures for producing precise results in the field, which in turn, will provide the most accurate mapping for BALS clients.

BALS is requesting PL training for their Field and Office Survey Technicians. Equipment to be used during PL includes Total Station Equipment, GPS, and Differential Levels. Training will be taught by subject matter-experts with demonstrated knowledge and expertise in the field. Instructors will monitor trainee's competencies as each trainee completes the training tasks and confirm proficiency. PL will be capped at 24 hours per trainee. BALS is requesting a trainee to trainer ratio of 1:2. Surveying equipment may require more than one person to operate to ensure accurate surveying and mapping results.

<u>RECOMMENDATION</u>

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum

Class/Lab Hours

8-60   Trainees may receive any of the following:

COMPUTER SKILLS
- Database and Website Management
- AutoCAD

CONTINUOUS IMPROVEMENT
- Client Relationship Development
- Project Management

COMMERCIAL SKILLS
- Project Research and Planning
- Intake and Processing of New Clients
- Office Project Set-Up
- Field Project Set-Up
- Field Survey Equipment Inspection and Care
- Field Survey Training
- Boundary & Topographic Surveys
- Construction Staking
- GPS Tools
- Differential Levels
- Error Analysis
- Project Execution and Client Management
- Technical Aspects of Drafting

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

Productive Lab Hours
0-24

COMMERCIAL SKILLS (Ratio 1:2)
- Office Project Set-Up
- Field Project Set-Up
- Field Survey Equipment Inspection and Care
- Field Survey Training
- Boundary & Topographic Surveys
- Construction Staking
- GPS Tools

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery. PL is capped at 24 hours per-trainee

TRAINING PROPOSAL FOR

Bearing Engineers, Inc.

18-0548

Panel Meeting Date:	01/24/18
Regional Office:	San Diego Regional Office
Analyst Name:	C. 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:		$ 49,972.00	
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$ 49,972.00	N/A	$ 0.00	$ 64,500.00

APPLICANT PROFILE

Company Summary	Bearing Engineers Inc. dba Motion Solutions (Bearing) is a specialty production house that manufactures custom application-specific engineered systems for orginial equipment manufactures and industrial customers in the medical, life sciences, semiconductor, robotics, and industrial automation sectors.

Industry Sector(s)	Manufacturing
Priority Industry	Yes
No. Employees (Applicant)	**State:** 80 **US:** 80 **World Wide:** 80
Turnover Rate (Applicant)	0.00 %
Repeat Contractor	No

High Unemployment Area	No
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Training will focus on Lean Manufacturing, Business, and Continuous Improvement Skills to improve efficiencies necessary for the Company to service their customers and remain competitive.

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	72	$ 26.00	26	$ 676	8 - 60
2	Job Creation – Retrainee Initiative Program	2	$ 26.00	25	$ 650	8 - 60

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 1956, and headquartered in Aliso Viejo, Bearing is a manufacturer and distributor of Linear Motion and Motion Control Products. The Company provides electromechanical subsystem manufacturing services from planning to production. The Company's customer base includes Aerospace and Defense, Automation and Robotics, Food and Beverage, Life Sciences, and Medical Equipment Companies. Training will take place at Bearing's single facility in Aliso Viejo.

2. Current Training Project Details

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

Retrainee- Job Creation

The program provides incentives to companies that commit to hiring new employees including a higher Reimbursement Rate:

Bearing has committed to hiring 2 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. Bearing Engineering is expanding their existing business by adding newly-hired employees in production to remain competitive within the industry.

Purpose of Training	Company representatives report that new products are continually brought to market by Original Equipment Manufacturers customers. To keep up with these products and respective customers, the Company must maintain certifications in AS-9100 (Aerospace) and International Organization for Standards ISO-13485 (Medical). In order to maintain these certifications, continual training is required.
	In addition, over the next 2 years, Bearing plans to grow their business by 15%, therefore expects to add 9 employees over the next 2 years. It expects to achieve the growth in business by acquiring manufacturing quality certifications, and develop a new marketing program for new customers. Bearing must also streamline the organization by eliminating time spent on unnecessary tasks. The Company will do this by promoting Lean initiatives.
	To achieve Lean objectives, Bearing has developed a comprehensive training plan across the entire organization. Training will focus on Manufacturing Skills designed to improve the movement of product in all phases of operation, Business Skills training for effective project management and Team cohesiveness

	that will improve communication and planning, and Continuous Improvement skills to bolster its Lean initiative by imparting process/quality and problem solving skills
	Additionally, training will also be provided to production staff on basic machine operation and set up. The increased level of board complexity and component changes requires quality inspectors to be trained on the latest standards (IPC-610, J-STD-001) and equipment (AOI, SPI).
	Bearing Engineers will also provide training on a new Material Requirement System (MRP) which will align work orders for customers. The MRP software was purchased August 2017.
	The ETP project will be overseen by Debbie Newman, Human Resource Manager. The Company will also utilize Training Funding Source to assist with administration.
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, Computer, Continuous Improvement, Hazardous Materials, and Manufacturing Skills.	

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	Training Funding Source	Seal Beach	$ 2,900.00
Administrative	None selected to date	N/A	N/A
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

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	Accounting/Finance
	Coaching/Communication
	Conflict Resolution
	Customer Relations
	Goal Setting
	Inventory Control
	Leadership
	Marketing/Business Development/Sales
	Performance Management
	Product Knowledge
	Program Management
	Project Management
	Team Cohesiveness
Computer Skills (Standard)	Accounting
	Crystal Reports
	ERP Software
	Manufacturing Resource Planning (MRP)
	MS Office/ Project
	Program Management
	Purchasing
	Quote FX
	R4
	Scheduling
	warehouse
Continuous Improvement Skills	6S
	AS9100
	Corrective/Preventive Actions
	ISO9001/ 13485
	Lean Manufacturing
	Process/Productivity/Quality improvement
Hazardous Materials Skills	HazMat handling
Manufacturing Skills (ME) (Standard)	Blueprint Reading
	Coordinate measuring machine (CMM) Inspection/Pr
	Equipment Operation, Maintenance & Troubleshooti
	Inspection Techniques
	Moisture Sensitive Devices
	Preventative maintenance
	Soldering
	Statistical Process Control (SPC)

Attachment 2 - Training Delivery and Curriculum Listing

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

	Surface Mount Defects—Causes and Prevention
	X-ray/Clean Machine Inspection

TRAINING PROPOSAL FOR

Brickley Construction Company, Inc. dba Brickley Environmental
18-0574

Panel Meeting Date:	12/08/2017
Regional Office:	North Hollywood Regional Office
Analyst Name:	Margarita Paccerelli
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:		$ 49,764.00	
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$ 49,764.00	N/A	$ 0.00	$ 38,280.00

APPLICANT PROFILE

Company Summary	Brickley Construction Company, Inc. dba Brickley Environmental (Brickley) is an environmental remediation contractor providing safe and cost-effective solutions for the containment, abatement and removal of hazardous materials.

Industry Sector(s)	Waste Management
Priority Industry	Yes
No. Employees (Applicant)	**State:** 57 **US:** 57 **World Wide:** 57
Turnover Rate (Applicant)	0.00 %
Repeat Contractor	Yes
High Unemployment Area	Yes
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	To enable staff to keep up with customer requirements and upgrade worker 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	Retrainee	56	$ 26.00	29	$ 754	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	10	$ 26.00	29	$ 754	8 - 60

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 1983, Brickley is an environmental remediation contractor providing safe and cost-effective solutions for the containment, abatement and removal of hazardous materials. The Company performs mold remediation and cleanup; microbial and particulate decontamination of building components, HVAC systems, and other air delivery systems. Services also include air filter replacement in sensitive areas such as hospital morgues, laboratories, and cleanrooms.

Its customer base includes government agencies, military facilities, schools, federal buildings, correctional facilities, hospitals, airports, water districts, universities, churches, commercial buildings, single and multi-family residences.

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	As a licensed hauler and handler of hazardous waste, Brickley safely removes and transports various contaminants, including polychlorinated biphenyls, lead, asbestos, mold, mercury and heavy metals. These hazardous materials require specialized packaging, manifesting, transportation and disposal methods, which will require employee training.
	In addition, the majority of Brickley's customers are from hospitals, schools, and the military which depend heavily on government funding for maintenance and upkeep of their facilities. As a result, there is specific contractual work criteria for Brickley that these customers require beyond federal and state requirements. The proposed training will enable staff to keep up with customer requirements and upgrade worker skills.
	To better serve its customers, Brickley added a new Demolition Division which has unique safety standards, demolition guidelines, equipment usage, and handling of waste stream tracking and disposal. To staff this division, Brickley has committed into hiring and training staff for 10 newly-created positions for Remediation Workers.
	Due to an overall public awareness of the effects of hazardous materials, environmental remediation standards continue to evolve. The industry has rapidly changing regulations and standards requiring training of its employees. The proposed training will also keep employees up to date with industry standards.

PROPOSED TRAINING PROJECT DETAILS

Training Infrastructure and Administrative Plan	Brickley's Controller and Executive Administrative Assistant will oversee training and project administration. This same staff had been administering the prior two ETP projects. Training will be delivered by in-house subject matter experts. The use of training vendors are to be determined. The Company's current annual training budget is $10,000.
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 Class/Lab training in Commercial Skills, Computer Skills, Continuous Improvement, and Hazardous Materials 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

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

Waivers	Description
High Unemployment Area	All trainees work in a High Unemployment Area (HUA), with unemployment exceeding the state average by 15%, under the Panel's standards. The Company's location in San Bernardino qualifies as an HUA. These trainees qualify for the Reduced Standard Wage rather than the Statewide Average Hourly Wage from $29.38 to $12.12 in Group 1 and from $13.22 to $10.50 in Group 2.
Frontline Worker (Working Supervisor)	Trainee population includes six Working Supervisors that supervise and work in conjunction with its field remediation crew members. These supervisors spend more than 50% of their time performing frontline work duties meeting the Panel's definition of frontline workers. As frontline workers, these trainees qualify for SET funding.

PROPOSED TRAINING PROJECT DETAILS

4.2 Subcontractor Summary

N/A

4.3 Previous ETP Project Summary

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

Active Contract(s) Elements	Summary
Agreement Number	ET17-0323
Purpose of Training	Training focused on process automation, new hardware and software, and new processes for overall efficiency. Some training in the proposal will be a continuation of the training in ET17-0122. However, due to funding cap for Small Business projects, Brickley was unable to deliver all training planned in the prior projects. Although some course topics are similar in the new proposal, no trainee will receive duplicate training.
Location(s)	San Bernardino
Term	12/02/16-12/01/17
Approved Amount	$99,840
Projected earnings	$99,840
Performance Percentage:	100%
Other Notes	Based on the ETP Systems, 4,634 reimbursable hours have been tracked for potential earnings of $99,840 (100% of approved amount).

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

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
ET17-0323	San Bernardino	12/02/16-12/01/17	$99,840	$99,840	100%*
ET16-0173	San Bernardino	09/15/15-09/14/16	$49,920	$49,920	100%
ET14-0311	San Bernardino	03/03/14-06/02/15	$49,280	$45,245	92%

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**
Commercial Skills (Standard)	OSHA 10/30
Computer Skills (Standard)	Estimating and Project Management Software
	Microsoft Office (Excel, Word, Access)
	QuickBooks
	Timesheet Estimating and Scheduling Software
Continuous Improvement Skills	Developing Client Relationships
	Field Construction Process Improvement
	Leadership Skills
	Lean Skills
	Office and Field Administrative Process Improvement
	Team Building
Hazardous Materials Skills	Environmental Management of Hazardous Materials
	HAZWOPPER

TRAINING PROPOSAL FOR

Clima-Tech LLC

18-0657

Panel Meeting Date:	01/24/2018
Regional Office:	North Hollywood Regional Office
Analyst Name:	Mark Reeves
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:		**$49,920.00**	
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$49,920.00	N/A	$0.00	$75,425.00

APPLICANT PROFILE

Company Summary	Clima-Tech LLC (Clima-Tech) provides maintenance and installation services of refrigeration and Heating, Ventilation, and Air Conditioning (HVAC) systems.

Industry Sector(s)	Construction
Priority Industry	Yes
No. Employees (Applicant)	**State:** 60 **US:** 60 **World Wide:** 60
Turnover Rate (Applicant)	5.00 %
Repeat Contractor	No
High Unemployment Area	No
Union(s)	No

TRAINING PROFILE

Training Objective(s)	Training will provide new and incumbent workers with the skills needed to properly build, install, and maintain HVAC systems in new and existing geographic markets.

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	53	$26.00	30	$780	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	10	$26.00	33	$858	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 2009 and headquartered in Chino, Clima-Tech services commercial refrigeration and HVAC equipment. These services include roof top unit construction, full maintenance and installation, and refrigerant changeouts and retrofits. Customers include convenience stores, supermarkets, restaurants, commissaries, fast food establishments, big-box retail, apartment buildings and strip malls. This will be Clima-Tech's first ETP Contract.

2. Current Training Project Details

Purpose of Training	In addition to expanding its coverage area to include more regions throughout California, Clima-Tech is in the process of adding new restaurant and big-box retail customers that require skilled technicians to service HVAC equipment. There are newer types of HVAC systems on the market such as Variable Refrigerant Flow air-conditioning systems and Propane/CO2 refrigeration systems that require specific training and certification. Additionally, energy efficiency standards and updates (Title 24, California Code of Regulations, Energy Efficiency Standards for Residential and Nonresidential Buildings) are having a significant impact on the HVAC/refrigeration and construction fields. Clima-Tech must prepare its employees to meet rising customer and industry demand driven by newer technology and improved building standards for energy efficiency. Technicians must learn to fabricate, assemble, install, diagnose, repair, and maintain equipment for more than 1,000 locations that are utilizing HVAC/refrigeration systems by various manufacturers. These systems include compressors, chillers, coils, receivers, condensers, heat exchangers, boilers, chilled water systems, ice machines, and reach-in/walk-in refrigerators. Administrative Staff must acquire the product knowledge needed to properly order parts, invoice customers, prepare kits for assembly, address customer inquiries, and troubleshoot. Training will take place at Clima-Tech's facility in Chino by in-house subject matter experts.
Training Infrastructure and Administrative Plan	Clima-Tech has a current training budget of approximately $75,000. Clima-Tech's Owner and Administrative Manager will coordinate training delivery and documentation, with assistance of department heads. The Company has also retained an administrative consultant to ensure that training and documentation meet ETP requirements.
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 Business, Commercial and Computer Skills. Technicians will also receive Hazardous Materials Skills.	

Delivery Method/Level	**Productive Laboratory**
Summary	
New and Incumbent Technicians will receive Productive Lab Commercial Skills 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.

Clima-Tech is expanding its reach into other parts of California: Central (Bakersfield, Fresno, and Modesto), South (San Diego) and North (Bay Area and Sacramento). Therefore, Clima-Tech has committed to hiring ten new Technicians (Group 2) to support the Company's business expansion efforts.

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

PROPOSED TRAINING PROJECT DETAILS

4.2 Subcontractor Summary

Clima-Tech 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

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	Coaching/Communication
	Customer Relations
	Leadership
	Planning
	Product/Service Knowledge
	Sales
Commercial Skills (Standard)	Brazing
	Centrifugal Systems
	Chillers
	CO2 Systems
	Compressors, Condensers
	Cooling Towers
	Electronic Devices and Controls
	Energy Efficient Building Management Systems Metering Devices
	Evaporators
	Heating Ventilation Air Conditioning Refrigeration
	Hot-Side
	Ice Machines
	Installation/repair/Preventative Maintenance Procedures
	OSHA 10
	Pressure Testing
	Propane Systems
	Refrigeration-Troubleshooting, Leaks and Recharging
	Standard Operating Procedures (SOP's)
	Thermostats
	Variable Speed Drives
	(Variable Refrigerant Flow Systems
	Water Circuitry and Treatment
Computer Skills (Standard)	Financial/Accounting-MS Dynamics GP
	Microsoft Office
	Mobile Tablet
Hazardous Materials Skills	Hazardous Materials Handling

Delivery Method /Level	*Productive Laboratory*
Training Type (Level)	**Planned Course Offerings**
Commercial Skills	Equipment Operation
PL Justification and Details	
Explain the need for productive laboratory (PL) training	HVACR technical training is not solely suitable for classroom instruction. Classroom training is not an adequate means of delivery because trainees must learn how to operate equipment that does not fit easily into a classroom setting. Customer equipment is varied and would be too costly to build in a classroom. Complex HVACR

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

	systems can only be located at customer sites. A classroom cannot replicate the environmental conditions that technicians must endure during HVACR system construction.
Describe the Equipment/Processes to be used in delivering the PL training	Compressors, Freezers/Coolers, Propane, CO2 Systems
Describe Trainer Qualifications	Instructors are the most knowledgeable company employees, with 20+ years work/industry experience and certification on equipment/systems from numerous equipment manufacturers.

Trainer to Trainee Ratios - If more than one PL class the ratios are the lowest and the highest trainer-to-trainee ratio	**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

Coast Medical Service, Inc., a Medical Group
17-0739

Panel Meeting Date:	01/24/2018
Regional Office:	North Hollywood Regional Office
Analyst Name:	Marisol Niquet
Type of Proposal:	Single Employer (SB), Small Business Program
Funding Source:	Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		$ 14,190.00	
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$ 14,190.00	N/A	$ 0.00	$ 33,280.00

APPLICANT PROFILE

Company Summary	Coast Medical Service, Inc. (CMS) offers hospital staffing solutions to hospitals and nursing services providers.

Industry Sector(s)	Waste Management
Priority Industry	No
No. Employees (Applicant)	**State:** 12 **US:** 12 **World Wide:** 12
Turnover Rate (Applicant)	5.00 %
Repeat Contractor	No
High Unemployment Area	No
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Training will improve processes to help reduce the time to deploy nurses.

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	35	$ 770	8 - 60
1	Retrainee	11	$ 22.00	35	$ 770	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	5	$ 22.00	45	$ 990	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1981 and headquartered in Beverly Hills, Coast Medical Services, Inc., A Medical Group (CMS), is a hospital staffing firm. Clients include hospitals such as Good Samaritan, Cedar Sinai Hospital and UCLA. CMS currently has 1000 nurses registered nationwide and 261 active for employment.

2. Current Training Project Details

Purpose of Training	To remain competitive, CMS must be able to dispatch nurses to hospitals quickly. For this, the Company recently implemented Short Message Service (SMS) which allows dial pad delivery method and real time interfacing with nurses. This equipment has helped to improve the scheduling of nursing staff to hospitals without the delay in contacting them and waiting for a response through email or phone calls. Training on SMS will help employees be more efficient and productive.
	Employees will also be trained in Business Skills and Continuous Improvement. Training in these skills will improve processes and allow employees to be better equipped to communicate with customers.
	Training will take place at the Company's location in Beverly Hills and will be delivered by a combination of in-house subject matter experts and vendors to be identified during the term of the contract.
Training Infrastructure and Administrative Plan	ETP funds will not displace the Company's commitment to training. CMS spends an estimated $50,000 annually in training at their California facility. The Company currently provides on-the-job training. 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

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 training in Business Skills, Computer Skills and Continuous Improvement 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. Training for newly hired employees will be reimbursed at a higher rate, and trainees will be subject to a lower post-retention wage.

CMS recently acquired a national health contract with over 13 facilities in Southern California. New employees are needed to handle inbound and outbound call and to help increase nurse availability. As a result, CMS has committed to hiring five new employees (Group 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

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	N/A
Administrative	Judith's Training Services	Los Angeles	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	Accounting
	Administration
	Business Administration
	Business Planning
	Business report writing and editing
	Conflict Management
	Customer Complaints
	Customer needs
	Customer Relations
	Customer Service
	Decision making
	Evaluations
	Financial Strategy
	Handling Customer Requests
	Identifying Customer Needs
	Interpersonal Skills
	Leadership
	Marketing
	Monitoring
	Motivation
	Negotiating
	Obtaining referrals
	Payroll
	Product Knowledge
	Resolving Complaints
	Strategic Planning
	Talent development and procurement
	Team Building
	Telephone Skills
Computer Skills (Standard)	Blue-Sky
	Computer Training
	Drop Box
	Excel
	Illustrator
	Metaphys
	Microsoft Office
	People Fluent
	Quick-books
	Right sourcing

	Shift Hound
	Shiftwise
	WFX
	Word Press
Continuous Improvement Skills	Decision Making
	Leadership Skills for Frontline Workers
	Problem Solving
	Process Improvement
	Production Operations/workflow
	Production Scheduling
	Quality Concepts
	Statistical Process Control (SPC)
	Team Building
	Total Quality Management

TRAINING PROPOSAL FOR

CPS PRINTING

17-0714

Panel Meeting Date:	01/24/2018
Regional Office:	San Diego Regional Office
Analyst Name:	Cassandra Clady
Type of Proposal:	Single Employer (SB), Small Business Program
Funding Source:	Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		$ 49,556.00	
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$ 49,556.00	N/A	$ 0.00	$ 25,000.00

APPLICANT PROFILE

Company Summary	CPS Printing dba Zuza Mam is a diviersifed printing company that manages and produces marketing materials for organizations.

Industry Sector(s)	Manufacturing
Priority Industry	Yes
No. Employees (Applicant)	**State:** 51 **US:** 51 **World Wide:** 51
Turnover Rate (Applicant)	2.00 %
Repeat Contractor	No
High Unemployment Area	No
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Recruit and train new employees to learn all aspects of the commercial printing industry. The Company's goal is to also provide ongoing training to current employees and new hires in order to meet customer demands.
	CPS is committed to provide training in Business Skills, Continuous Improvement, Literacy Skills and Manufacturing Skills. All occupations will be trained.

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	5	$ 26.00	50	$ 1300	8 - 60
2	Retrainee	46	$ 26.00	36	$ 936	8 - 60

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

CPS Printing, (CPS) began in 1984 as a quick print and duplication shop based in Carlsbad with only 20 employees. Today CPS does digital printing to meet clients printing demands.

The Company targets many industries, such as restaurants (Rubio's, Islands, In & Out), pharmaceutical (Orexigen, Hologic, Prometheus Labs), local government (City of Carlsbad, Oceanside, San Marcos), retail trade (Eufora Jon Renau, iTan, etc), and hospitality & tourism (LegoLand, Del Mar Fair Grounds, San Diego Zoo).

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	
	CPS continues to expand its business with innovative products and services to tailor fit the unique demands of large to medium size businesses. CPS's philosophy is that with additional training, the Company can introduce new technologies and process within all areas of the business, consequently increasing business capacity and reducing the potential for business downsizing and layoffs. To that end CPS proposes to train its workers in the most critical areas of its business to close existing skill gaps.
	The printing industry faces a market with many opportunities and significant demands. Sales are becoming more consultative versus transactional with today's market customers. CPS representatives need to become more specialized to earn the trust of customers. The Company's goal is to provide additional training for sales staff to maximize opportunities with existing and new customers. Since the majority of CPS sales staff and production staff are tenured there is a need to reinforce their current skills, as well as learn new skills and techniques in sales and service. In-line with improving customer services, the sales staff also need to become effective in problem-solving.
	In addition to training for sales staff, CPS Production staff will be trained on new equipment such as the Smart Slitter in the Bindery department, which slits paper and scores, and New Work Flow XMF for the Press department which handles files, proofing, plating, and new plate setting. In addition, some production staff may require some literacy skills training to effectively communicate on the production floor. No more than 45% of Literary Skills training will be conducted for this project.

PROPOSED TRAINING PROJECT DETAILS

	All staff will require process improvement training to effectively manage through operations to meet customer demands. The company current training budget is $30,000.
Training Infrastructure and Administrative Plan	The Controller will have oversight of this project and ensure all training is scheduled and documented per ETP record keeping requirements. Training will be delivered by in-house subject matter experts.
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 Skills, Continuous Improvement Skills, Literacy Skills, and Manufacturing Skills listed (Attachment 2).	

4. Additional Company or Training Project Details

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

Retrainee- Job Creation

The program provides incentives to companies that commit to hiring new employees including a higher Reimbursement Rate:

- $26 for all delivery methods (Class/Lab; Productive Lab; E-Learning)

CPS has committed to hiring five 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. CPS is expanding their workforce for the following reasons:
New Equipment/Machinery.

4.1 Program Waivers

No waivers have been applied to this proposed project.

PROPOSED TRAINING PROJECT DETAILS

4.2 Subcontractor Summary

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	Business Plans & Strategies
	Change Management
	Customer Service
	Evaluating Market Effectiveness
	Excel Intermediate Skills
	Inventory Control
	Marketing Techniques
	New Product Introduction
	Selling / Serving the Customer
Continuous Improvement Skills	Creative Innovative Thinking
	Creative Problem Solving Skills
	Cycle Time Reduction Time Skills
	Documentation Development Skills
	Industry Best Practices
	ISO Skills
	Leadership Skills
	Lean Manufacturing Skills
	Mailing Skills
	Presentation Skills
	Process Improvement Skills
	Strategic Management Skills
	Team Building Skills
	Total Quality Management Skills (TQM)
	Train on Paperless Workflows
	Verbal Communication Skills
Literacy Skills	Basic Math Skills
	Basic Writing Skills
	Reading Comprehension
Manufacturing Skills (ME) (Standard)	Assembly Operations
	Data Collection
	Good Manufacturing Practices
	Optimal Operating Methods
	Production Techniques
	Safety Skills
	Shipping and Receiving
	Total Quality Management
	Training within Industry
	Warehouse Operations / Distributions
	Workflow

TRAINING PROPOSAL FOR

DALTA, Inc.

18-0508

Panel Meeting Date:	01/24/2018
Regional Office:	North Hollywood Regional Office
Analyst Name:	Elsa Wadzinski
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:		$33,374.00	
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$33,374.00	N/A	$0.00	$47,500.00

APPLICANT PROFILE

Company Summary	DALTA, Inc. is an auto body collision repair facilities providing services including painting, towing, asscoiated parts sales, mechanical repairs to consumers, insurers and fleet accounts.

Industry Sector(s)	Services (Other)
Priority Industry	No
No. Employees (Applicant)	**State:** 25 **US:** 25 **World Wide:** 25
Turnover Rate (Applicant)	7.00 %
Repeat Contractor	No
High Unemployment Area	No
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Training will enable the Company to meet the steep learning curve associated with new technologies related to changing vehicle manufacturing methodologies and materials; while also ensuring safe repairs for consumers. In addition, the Company's rapid growth, along with projected growth over the next 2 years, create a need to train staff on process and lean oriented concepts, communication, team work, customer interaction/relationship building and sales training to build the comprehensive skills needed to expand operations, while ensuring a high level of customer and employee satisfaction and bottom line profitability.
	Finally, the Company's new partnerships with Farmers and State Farm require training in unique processes and documentation 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	17	$22.00	58	$1,276	8 - 100
2	Job Creation – Retrainee Initiative Program, Retrainee	9	$22.00	59	$1,298	8 - 100

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1996 and located in Whittier, DALTA, Inc. dba Fix Auto Whittier (DALTA) is an automotive collision repair company. DALTA requests funding for its employees and its close affiliate: H.G.A.D. Enterprises dba Fix Auto Santa Ana in Santa Ana. Both locations fall under the same ownership.

Customers include individual consumers, insurers and fleet accounts in the Los Angeles, Orange, and Riverside counties. The Company has parternship agreements with USAA, Allied Nationwide, and Geico Insurance to provide collision repair services.

This will be DALTA's first ETP Agreement.

2. Current Training Project Details

Purpose of Training	With technology constantly changing, Technicians and Estimators must upgrade skills to provide service on newer vehicles. Technicians and Estimators must understand how body repairs differ based on vehicle metal composition. Workers also need to learn how new technology advances in alternative fuel systems have changed the way auto repairs are performed, and how to estimate repair costs for vehicles with newer technology.
	Training will include automotive repair that utilizes metals such as aluminum and ultra-high strength steels and composites. Training will also include damage assessment skills for newer technology vehicles including how to diagnose and troubleshoot vehicle issues utilizing computerized test equipment.
	Training will also include Business, Computer and Continuous Improvement skills for all occupations in customer service, sales, quality assurance and standard operating procedures.
Training Infrastructure and Administrative Plan	DALTA's Human Resources Manager will oversee all training and administration of the ETP project. The Company has also retained Synergy Management Consultants to assist with the administration. The company has prepared a training schedule and plans to train all staff on the program and maintaining rosters and other records.
	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

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, Commercial, Computer and Continuous Improvement Skills. Only Supervisors will receive training in Management Skills.	

Delivery Method/Level	Productive Laboratory
Summary	
Technicians and Estimators will receive Productive Lab training in Commercial Skills. Training will be delivered with a 1:1 trainer-to-trainee ratio.	

4. Additional Company or Training Project Details

Retrainee-Job Creation

DALTA's business is expanding due to the addition of new partnerships with Farmers and State Farm. In this proposal, DALTA has committed to hiring nine new employees, including four Technicians, two Estimators and one Administrative person (Group Number 2). To be eligible for reimbursement, trainees must be hired during the three-month period prior to Panel approval, or during the contract term. In support of job creation, newly hired employees will be subject to a lower post-retention wage.

4.1 Program Waivers

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

Waivers	Description
Increase in the cap for the maximum number of training hours allowed for a Small Business	Although Retrainees and Job Creation trainees will receive similar training, trainee training hours will vary based on experience and technology level. DALTA requests a waiver to increase the maximum number of training hour cap for a Small Business from 60 hours to 100 hours to allow trainees to receive training needed commensurate to their experience.

PROPOSED TRAINING PROJECT DETAILS

4.2 Subcontractor Summary

DALTA has retained the services of the following Subcontractor.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Synergy Managment Consultants, LLC	Grass Valley	$ 2,500.00
Administrative	Synergy Managment Consultants, LLC	Grass Valley	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	Conflict Resolution
	Customer Care Skills
	Customer Engagement
	Direct Repair Partner Management
	Educating the Consumer
	Overcoming Objections
	Presentation Skills
	Sales Procedures and Strategies
	Understanding Financial and Operating Metrics
Commercial Skills (Standard)	3 Stage Refinishing Process
	3D Measuring Systems
	Active Lane Keeping Systems
	Adhesive Bonding
	Adv Materials and Composite Repair
	Aluminum Bonding and Structural Repair
	Aluminum Tools and Minor Repair
	Collision Repair Skills
	Color Sand/Polish/De-Nib Surfaces
	Color Theory and Matching Principles
	Estimating Mechanical and Electrical Systems
	Estimating Hybrid and Electrical Vehicles
	Estimating Steering and Suspension Damage
	Hybrid and Electric Vehicle Repair
	Hybrid Vehicle Battery/Charging Systems
	ICAR Collision Repair/ Refinish Skills
	Mig/TIG/ Resistance Spot Welding
	OEM Cert Toyota, Honda, VW, BMW, GM, Ford
	Pillars, Rockers, Floors, Rail Replacement
	Plastic and Composite Repair
	Product Knowledge
	R1234yf AC Systems
	Refinish Skills
	Spray Gun Se-Up and Maintenance
	Steering, Suspension and Mechanical Systems
	Structural Repair/Unibody Alignment
	Surface Preparation
	Vehicle Priming and Sealing
Computer Skills (Standard)	All Data Application
	Car-O-Liner Measuring Software

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

	CCC1 Software
	Fix Auto Software Applications
	Mitchell Estimating
	MS Office Intermediate/Advanced
	OEM Repair Process Retrieval
	Parts Trader- Parts Procurement Software
	Quickbooks
	Repair Scanning Software
	Tesla Estimating/Parts Software
	VOC Tracking
Continuous Improvement Skills	Emergency Clean Up Procedures
	Handling Chemicals and Clean Up Procedures
	Just-in-Time Inventory Control/Protocol
	Lean Process and Integration
	Managing MSDS Sheets
	Problem Solving and Decision Making Skills
	Quality Assurance
	Root Cause Analysis
	Standard Operating Procedures
	Team Building
Management Skills	Coaching Skills for Supervisors
	Collaborative Leadership
	Creating Business Strategy
	Employee Engagement
	Understanding Finance and Operational Metrics

Delivery Method /Level	*Productive Laboratory*
Training Type (Level)	**Planned Course Offerings**
Commercial Skills	3 Stage Color Match
	3D Measuring Se-Up/Analysis
	Aluminum Bonding
	Aluminum Repair
	Aluminum Welding
	Body Filler Methods
	Color Blending
	Color Tinting
	Estimating Advanced Vehicle Systems
	Estimating Diagnosis
	Estimating Adv Materials Composite Struct
	Estimating DRP Procedures New Tech
	Mig Brazing
	Rivet Bonding

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

	Scanning Analysis
	Structural Corrections with 3D Measuring
	Structural Welding

PL Justification and Details	
Explain the need for productive laboratory (PL) training	Productive Lab-Commercial Skills is needed as Technicians and Estimators coming into the industry lack hands on training. Even those who attend vocational schools such as Wyotech or UTI lack substantial hands on training and skills that are necessary to perform job functions DALTA has found that when these employees enter the workforce, they must be trained in a 1:1 environment with journey level technician. PLT will allow DALTA to use master trained or subject matter experts to train new technicians on collision repair.
Describe the Equipment/Processes to be used in delivering the PL training	Equipment to be used will be resistance spot welders, mig (metal inert gas) welders, frame rack and measuring system, spray guns, spray booths, various hand tools, All-data IT, estimatics for estimators including Mitchell, CCC systems and CCCOne Software. OEM manufacturer specific, and Snap-On scanners
Describe Trainer Qualifications	Trainers will be Journey Level Technicians with the level of experience necessary to facilitate expected outcome. 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	1
Ratio for Maximum Ratio When More than One Class	1	2
PLT Approval	Yes	

TRAINING PROPOSAL FOR

Emazing Lights, LLC
18-0511

Panel Meeting Date:	01/24/2018
Regional Office:	San Diego Regional Office
Analyst Name:	Kellen Hernandez
Type of Proposal:	Single Employer (SB), Small Business Program
Funding Source:	Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		$ 49,296.00	
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$ 49,296.00	N/A	$ 0.00	$ 49,351.00

APPLICANT PROFILE

Company Summary	Emazing Lights, LLC (EL) designs, manufactures, and assembles LED glove sets and other LED accessories for customers across North America.

Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	**State:** 45	**US:** 45	**World Wide:** 45
Turnover Rate (Applicant)	11.00 %		
Repeat Contractor	No		
High Unemployment Area	Yes		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	This project will provide the Company with the tools necessary to develop a training culture that will increase production and improve product quality and management of customer demand

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	39	$ 1014	8 - 60
1	Retrainee	43	$ 26.00	39	$ 1014	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	4	$ 26.00	45	$ 1170	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 2010 and headquartered in Anaheim, EL designs, manufactures and assembles LED glove sets used by light show artists for music festivals, light show competitions, and social media platforms. EL's three locations will participate in this proposal, and training will occur at all three locations. This will be EL's first ETP Agreement.

2. Current Training Project Details

Purpose of Training	Rapid growth in EL's customer base accompanied by high customer expectations require the Company to develop talent to ensure fast introduction of new products to the market. The Company will also focus on growing business by increasing productivity, efficiency, sales, and market share. Additionally, EL needs to manufacture high quality products at the lowest cost to remain competitive. To accomplish this, the Company plans to invest resources on software needed to design and create new products and maximize the strength of employees' technical skills. Training will be delivered by in-house subject-matter experts and, if necessary, vendors.
Training Infrastructure and Administrative Plan	EL has hired California Manufacturing Technology Consulting (CMTC) to support its administrative efforts. EL staff and CMTC will coordinate all training efforts, including scheduling training, securing rosters, providing trainee enrollment data, verifying training and retention completion, participating in ETP monitoring activities and ensuring compliance with all ETP requirements.
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 job specific training in Business, Computer, Continuous Improvement and Manufacturing Skills topics listed under Attachment 2.	

PROPOSED TRAINING PROJECT DETAILS

Delivery Method/Level	E-Learning - Instructor Led/Distance Learning
Summary	
All occupations will receive job specific training in Business, Computer, Continuous Improvement and Manufacturing Skills topics listed under Attachment 2.	

4. Additional Company or Training Project Details

Retrainee – Job Creation

EL is expanding business capacity by hiring new employees. The Company's strategic vision is to grow by hiring Marketing & Sales Staff and Customer Support Staff to partner with customers and identify product enhancements and innovations that meet and exceed customer expectations. This requires talented Marketing & Sales Staff that are able to engage customers and knowledgeable Customer Support Staff to effectively address customer needs.

EL has committed to hiring four new employees (Group 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

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	California Manufacturing Technology Consulting	Torrance	$ 4,900.00
Administrative	California Manufacturing Technology Consulting	Torrance	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	Business Writing
	Conflict Management
	Customer Service Skills
	Effective Meeting Skills
	Global Business & Exporting
	Goal Setting
	Negotiation Skills
	New Product Development
	Presentation Skills
	Procurement
	Product Knowledge
	Project Managment
	Sales & Selling Skills
	Time Management Skills
Computer Skills (Standard)	Adobe Suite
	E-Commerce
	Enterprise Resource Planning
	Microsoft Office (Intermediate & Advanced)
	SalesForce & Customer Management Tools
	SolidWorks
Continuous Improvement Skills	Communication Skills
	Leadership Skills
	Lean Enterprise
	Problem Solving
	Process Improvement
	Quality Control & Inspection
	Quality Improvement
	Risk Management
	Six Sigma
	Supply Chain Optimization
	Teams & Team Building
Manufacturing Skills (ME) (Standard)	Equipment Operation
	Inventory Control
	Manufacturing Logistics Management
	Production Skills
	Requirements for Device Safety
	Safety

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	E-Learning – Instructor Led/Distance Learning
Training Type (Level)	**Planned Course Offerings**
Business Skills	Business Writing
	Conflict Management
	Customer Service Skills
	Effective Meeting Skills
	Global Business & Exporting
	Goal Setting
	Negotiation Skills
	New Product Development
	Presentation Skills
	Procurement
	Product Knowledge
	Project Managment
	Sales & Selling Skills
	Time Management Skills
Computer Skills (Standard)	Adobe Suite
	E-Commerce
	Enterprise Resource Planning
	Microsoft Office (Intermediate & Advanced)
	SalesForce & Customer Management Tools
	SolidWorks
Continuous Improvement Skills	Communication Skills
	Leadership Skills
	Lean Enterprise
	Problem Solving
	Process Improvement
	Quality Control & Inspection
	Quality Improvement
	Risk Management
	Six Sigma
	Supply Chain Optimization
	Teams & Team Building
Manufacturing Skills (ME) (Standard)	Inventory Control
	Manufacturing Logistics Management
	Requirements for Device Safety

TRAINING PROPOSAL FOR

GBC International Bank

17-0655

Panel Meeting Date:	1/24/2018
Regional Office:	North Hollywood Regional Office
Analyst Name:	Jela Romero
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: $36,960.00			
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$36,960.00	N/A	$0.00	$20,000.00

APPLICANT PROFILE

Company Summary	GBC International Bank (GBCIB) (www.gbcib.com) is a commercial bank specializing in domestic and international trade finance services with an emphasis on export financing. The Company also provides financing of owner-occupied and investor owned commercial properties, Small Business Account loans, business lines of credit, letters of credit and retail banking services.

Industry Sector(s)	Finance & Insurance
Priority Industry	No
No. Employees (Applicant)	**State:** 91 **US:** 99 **World Wide:** 99
Turnover Rate (Applicant)	5.00 %
Repeat Contractor	No
High Unemployment Area	No
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	The Company has implemented a Five-Year Strategic Plan, outlining specific company goals such as expansion through mergers and acquisition and installing technology upgrades within the Company, all dependent on extensive employee training and skills development.
	Training will allow the Company to achieve streamlined processes, improve customer service and increase productivity.

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	48	$22.00	30	$660	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Headquartered in West Los Angeles with branches throughout California and Washington, GBCIB was organized in 1976 as First Women's Bank of California. In 1999, GBCIB was designated as a Delegated Authority Lender of the Export-Import Bank of the United States (Ex-Im Bank) which allows GBCIB to approve Ex-Im loans that help create and maintain U.S. jobs by financing the sales of U.S. exports. GBCIB has since been ranked as one of the nation's top lenders of this type of loans. On August 1, 2007, the current investors adopted a new name, GBC International Bank, which reflects its long standing expertise in handling international trade and commercial real estate financing, and business and personal banking services. GBCIB has maintained a "Preferred Lender" status with the U.S. Small Business Administration.

GBCIB's customers include commercial businesses, business owners, and similar organization with export and import needs, including commercial real estate lending and international banking services. Over the years, GBCIB has grown in both employee numbers and company assets.

For this first-time ETP Agreement, employees in the following locations will participate in the training: Los Angeles, Monterey Park, City of Industry, Rowland Heights, San Francisco (LPO), San Francisco and San Jose.

2. Current Training Project Details

Purpose of Training	GBCIB's five-year strategic plan requires all existing employees and new hires to learn essential skills to assist the Company's drive towards change initiatives to support and respond to its growth.
	For this purpose, the Company plans to train its existing employees at an average of four hours each month for the next nine months in Business, Computer, Continuous Improvement, Commercial Skills and Computer-Based Training (CBT).
Training Infrastructure and Administrative Plan	The Human Resources Generalist and two Training Coordinators will coordinate, facilitate and oversee all the aspects of training at all participating branches. This includes scheduling training and ensuring training is documented for ETP reimbursement. Each facility or branch will also have a designated administrator to assist with administration and will coordinate directly with the main branch on a monthly basis.
	Training will be delivered by in-house staff and vendors.
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	
Training will be proved to all occupations in Continuous Improvement, Business, Computer and Commercial Skills.	

Delivery Method/Level	E-Learning - Computer Based Training (CBT)
Summary	
All occupations will receive up to 15 hours of CBT in Commercial Skills.	

Delivery Method/Level	E-Learning - Instructor Led/Distance Learning
Summary	
All occupations will receive some training provided via E-learning – Instructor Led/Distance Learning in Commercial 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 the training, curriculum and associated program characteristics.

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	**Planned Course Offerings**
Business Skills	Accounting Principles
	Administrative Services
	Business Grammar, Tips & Tricks
	Business Writing Skills
	Conflict Resolution Skills and Strategies
	Consultative Approach in Sales Management
	Contracts and Vendor Management
	Cost Accounting
	Creating and Selling a Business Plan
	Data Management Strategies
	Decision Making Strategies
	Documenting Processes and Procedures
	Effective Presentation Skills
	Effective Sales Negotiation
	Effective Writing of Policies and Procedures
	Handling Sales Objections or Rejection
	How to Write Business Correspondence and Documents
	Improving Team Effectiveness
	Internal Auditing
	Managing Priorities
	Managing Your Sales Pipeline
	Mastering Sales Opportunities
	Operational Forecasting
	Organizational and Planning Skills
	Payroll Administration
	Principles of Accounts Payable & Collections
	Problem Solving Skills
	Process Improvement
	Product Training - Introduction to New Products
	Product Training - Sales Training
	Professional Develepment - Emotional Intelligence
	Professional Development - Accountability
	Professional Development - Behavior Style Strategies
	Professional Development - Change Management
	Professional Development - Effectively Communicating Goals and Expectations
	Professional Development - Managing Cultural Differences
	Professional Development - Managing Difficult Conversations
	Professional Development - Motivation Strategies
	Professional Development - The Power of Influence

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

	Professional Networking Skills
	Project Management Techniques and Strategies
	Relationship Building Techniques
	Risk Assessment and Analysis
	Sales Forecasting Methods
	Sales Presentations That Win
	Sales Prospecting and Appointment Setting
	Sourcing Prospective Clients
	Strategic Planning, Monitoring and Evaluations
	Understanding Employee Benefits
Computer Skills (Standard)	Computer Network and Systems
	Fidelity
	Fiserv
	HTML Basics
	Jack Henry
	MS Office Suite (Word, Excel, PowerPoint, etc.)
Continuous Improvement Skills	Consultative Approach in Sales Management
	Cost Accounting
	Data Management Strategies
	Improving Team Effectiveness
	Principles of Accounts Payable & Collections

Delivery Method /Level	*E-Learning – Instructor Led/Distance Learning*
Training Type (Level)	**Planned Course Offerings**
Commercial Skills (Standard)	Banking Regulatory Updates

Delivery Method /Level	*E-Learning – Computer Based Training (CBT)*	
Training Type (Level)	**Planned Course Offerings**	**Standard Hours**
Commercial Skills (Standard)	Branch Management	12.00
	Teller Basics	12.00
	Universal Banker	12.00

TRAINING PROPOSAL FOR

HMWC CPAS & BUSINESS ADVISORS

18-0599

Panel Meeting Date:	01/24/2018
Regional Office:	San Diego Regional Office
Analyst Name:	Heather Bernard
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: $32,692.00			
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$32,692.00	N/A	$0.00	$34,929.00

APPLICANT PROFILE

Company Summary	HMWC CPAS & Business Advisors (HMWC) is a certified public accountant firm providing accounting services and business advisory services for private companies, non-profits and restaurants.

Industry Sector(s)	Professional, Scientific, and Technical		
Priority Industry	No		
No. Employees (Applicant)	**State:** 68	**US:** 68	**World Wide:** 68
Turnover Rate (Applicant)	1.00 %		
Repeat Contractor	No		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Training will focus on new software and technologies, regulatory tax updates, and training newly hired staff on business processes.

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	12	$22.00	28	$616	8 - 60
2	Owner, Retrainee	3	$22.00	25	$550	8 - 60
2	Retrainee	43	$22.00	25	$550	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1968 and located in Tustin, HMWC provides financial, tax and business advisory services including consulting, business valuation and employee benefits and estate planning for companies across Southern California. HMWC specializes in the healthcare, real estate manufacturing and restaurant industries but serves clients across many industries ranging in size from small to large. This first ETP Contract training will be delivered at the Company's single location in Tustin.

2. Current Training Project Details

Purpose of Training	
	Currently HMWC is experiencing significant growth and is expecting to continue its growth by 20% in the next two years. To highlight this growth, the Company in the process of acquiring two CPA firms by January 2018. These acquisitions will allow the Company to expand its expertise in the healthcare and real estate markets by adding highly knowledgeable staff. These acquisitions will bring in a total of 10 additional new employees to the Company. These new staff will need extensive training internal policies and procedures as well as business practices to ensure a smooth transition. All newly acquired staff will be HMWC employees and will work out of their Tustin location.
	In addition, HMWC is implementing new tax preparation software, CCH Axcess Suite. This software consists of different software modules including a cloud based document management system, a practice management tool and a work stream software tool. Implementation will begin in January 2018 with training for 15 staff and continue again in July 2018 after the firm's busy tax season has concluded. The firm is also implementing new tax software, ProSystem fx to automate its tax compliance and tax returns. This will be implemented later in 2018 and will increase its efficiency and accuracy of tax returns for its customers.
	Finally, in 2018, HMWC is implementing a new phone system to integrate its phones with its Customer Relationship Management tool and its data center, allowing the Company to easily instant message, set up audio and web-conferencing and collaboration tools across the company. All of these new platforms will require training for staff depending on job function.
	There are also ongoing training needs the Company must address, including regulatory updates, accounting & auditing skills, customer service skills, leadership skills, conflict resolution, project management and estate planning. This training will be delivered to Accountants, Consultants, Managers, Administrative Staff and Partners.

PROPOSED TRAINING PROJECT DETAILS

	No training under this project will be used for obtaining or maintaining a professional license for the CPA's on staff. In order to ensure there is no duplication of training in this regard, the Company has an internal tracking system it will utilize which captures the hours needed for continuing education credits and will ensure that the hours included for ETP training are not utilized as CE credits.
Training Infrastructure and Administrative Plan	The Company's CFO will oversee the project and will work with Managers to schedule training and complete the ETP rosters. HMWC has retained Corporate Tax Incentives, LLC to assist with administration of the project. Training will be provided 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 in Business, Commercial, Computer and Continuous Improvement Skills. Only Managers and Owners will receive Management Skills.	

Delivery Method/Level	E-Learning - Instructor Led/Distance Learning
Summary	
All occupations will receive training in Commercial Skills.	

4. Additional Company or Training Project Details

Due to the Company's growth, HMWC is adding new positions to existing job functions. In the next two years HMWC expects to hire 12 new staff, 10 of which will be hired in January 2018 as a part of the Company's acquisitions. The Company expects to bring on 2 new Partners and 10 Accountants as a part of the ETP project. All Retrainee/Job Creation trained in this project will be "net new hires" and not the routine replacement of a vacancy.

4.1 Program Waivers

N/A

PROPOSED TRAINING PROJECT DETAILS

4.2 Subcontractor Summary

HMWC has retained the services of the following Subcontractor.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Corporate Tax Incentives LLC	Rancho Cordova	$1,307.68
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	Accounts Receivable
	ACH Payment Transaction
	Best Practices
	Billing
	Communication
	Customer Service
	Leadership
	Marketing
	Payroll
	Problem Resolution
	Project Management
	Workload Management
Commercial Skills (Standard)	Accounting and Auditing
	Estate Planning
	Financial Statements
	Internal Revenue Code Updates
	Tax Compliance
	Tax Incentives
	Tax Regulations
	Tax Returns Preparation
Computer Skills (Standard)	Income Tax Preparation software
	Tax Automation Software
	Accountant Software
	Adobe Office Suite
	Audit Management Software
	Billing Software
	CCH Axcess Office Suite
	Client Software
	Communicator software
	Excel, Word, Outlook, Powerpoint
	Project Management Software
	QuickBooks
	Tax Research Software
Continuous Improvement Skills	Coaching
	Planning
	Scheduling
	Team Building
	Work Flow Processes
Management Skills	Effective Client Development

Attachment 2 - Training Delivery and Curriculum Listing

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

	Problem Solving & Decision Making

Delivery Method /Level	*E-Learning – Instructor Led/Distance Learning*
Training Type (Level)	**Planned Course Offerings**
Commercial Skills (Standard)	Accountant Software
	Accounting & Auditing
	Audit Management Software
	Communicator Software
	Income Tax Preparation Software
	Tax Automation Software
	Tax Compliance

TRAINING PROPOSAL FOR

Hope By the Sea, Inc.

17-0798

Panel Meeting Date:	01/24/2018
Regional Office:	San Diego Regional Office
Analyst Name:	Cassandra Clady
Type of Proposal:	Single Employer (SB), Small Business Program
Funding Source:	Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		$ 24,336.00	
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$ 24,336.00	N/A	$ 0.00	$ 36,533.00

APPLICANT PROFILE

Company Summary	Hope by the Sea, Inc. is a 57-bed family-owned addiction treatment center that provides full services, from detox to transitional living, in a supportive and peaceful environment.

Industry Sector(s)	Healthcare		
Priority Industry	Yes		
No. Employees (Applicant)	**State:** 80	**US:** 80	**World Wide:** 80
Turnover Rate (Applicant)	10.00 %		
Repeat Contractor	No		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	The goal of training is to ensure workers/employees possess skills necessary to help the Company attain accreditation by The Joint Commission which accredits and certifies 20,500 health care organizations and programs in the United States.

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	24	$ 26.00	39	$ 1014	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 2003 in San Juan Capistrano, Hope by the Sea is a drug and alcohol rehab center for substance abuse patients. Clinicians utilize a variety of therapeutic processes that allow personalized treatment for clients.

The Company meets out-of-state competition because clients come from all over the United States.

2. Current Training Project Details

Purpose of Training	The high demand for quality residential substance abuse rehab facilities continue to be a concern in the healthcare industry. Hope by the Sea must expand its patient/client care capacity to meet the treatment needs of California and other states. To do so, the Company must increase insurance partners covering prospective patients by maintaining Joint Commission accreditation. The Company will need to implement training to on standards including: documentation training on changing Joint Commission Accreditation Health Care Certification (JCAHO) standards and insurance requirements for billing, patient privacy, counseling standards, treatment planning, and risk assessment training on new forms and different levels of care. Joint Commission accreditation and certification is recognized nationwide as a symbol of quality that reflects an organization's commitment to performance standards. The Company will also need to improve patient core standards. Therapists, Counselors and Supervisor/Managers will be trained on Commercial Skills to improve client care as well as Continuous Improvement to increase efficiency and Computer Skills to improve productivity in software systems. Good communication skills are also critical to provide quality care for clients, family members, doctors and referral sources.
Training Infrastructure and Administrative Plan	The ETP project will be overseen by the Company's Vice President of Finance. The Company also retained Training Funding Source to help with administration. Training will be delivered by in-house subject-matter experts.
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 Commercial Skills, Computer Skills, and Continuous Improvement.	

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	Training Funding Souce	Seal Beach	$ 1,990.00
Administrative	None selected to date	N/A	N/A
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 provide additional 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**
Commercial Skills (Standard)	Abnormal psychology
	Addictions risk management
	Assessment
	Behavior Management
	Case Management
	Client Education
	Communication Skills
	Community Resources
	Counseling skills
	Crisis Intervention
	Cultural awareness
	Customer relations
	Detox procedures
	Documentation
	Drug and alcohol recovery process
	Drug use and abuse
	Family effects and intervention
	Individual and group counseling
	Insurance
	Joint Commission standards
	Outpatient treatment
	Patient care
	Psychological disorders
	Psychopharmacology
	Readmissions
	Rehabilitation techniques
	Relapse avoidance techniques
	Residential Rehab
	Sober living
	Social, cultural and age-related influences
	Treatment and prevention methods
Computer Skills (Standard)	Electronic Medical Records (EMR)
	Medical Billing
	MS Office Suite
Continuous Improvement Skills	Problem Solving
	Quality Improvement
	Team Building

TRAINING PROPOSAL FOR

I. J. LARSEN PUMPS, INC.

17-0850

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:	SET

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		$ 10,504.00	
Program & Admin Cost	**SupportCost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$ 10,504.00	N/A	$ 0.00	$ 7,100.00

APPLICANT PROFILE

Company Summary	I. J. Larsen Pumps, Inc. (Larsen Pumps) installs and repairs water well pump systems in California's Central Valley. They also test and inspect water wells.

Industry Sector(s)	Construction
Priority Industry	Yes
No. Employees (Applicant)	**State:** 12 **US:** 12 **World Wide:** 12
Turnover Rate (Applicant)	16.67 %
Repeat Contractor	No
High Unemployment Area	Yes
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Demand for services has significantly increased in recent years and the Company is expanding from a single work group to multiple groups. This allows the Company to simultaneously service multiple clients and increase revenue.

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	3	$ 26.00	40	$ 1040	8 - 60
2	Owner, Retrainee	4	$ 26.00	28	$ 728	8 - 60
2	Retrainee	4	$ 26.00	28	$ 728	8 - 60
3	Ex-Offender Program, Retrainee	1	$ 26.00	60	$ 1560	8 - 60

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Larsen Pumps seeks ETP funding for retraining. The Company, founded in 1910, is headquartered in Modesto with a second location in Hilmar. Both locations will participate in training.

Larsen Pumps installs, repairs, supplies parts for, and services and inspects residential, industrial, commercial and agricultural water well pumps using cranes and well drilling rigs. The Company also offers real estate well water inspections including D-1 well water testing.

Customers include homeowners, farmers, dairy owners, schools, real estate agents, hospitals, local city and municipal agencies, and churches throughout the Central Valley.

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	To accomplish the Company's goal of multiple work groups, Larsen Pumps will train current employees on crane operation, drilling rigs, well pumps, and new software.
	Crane and drill rig training will provide an in-depth overview of well construction equipment. All staff will be trained on the aspects of well pumps to improve skill sets and to allow staff to work more independently. Larsen Pumps will also cross train staff in multiple facets of operations to promote a higher level of service to clients.
	The company is also launching a new inventory program and all staff will receive training on the software and hardware. The new technology for inventory management will permit more installation and repair support, as well as streamline the supplies for the technicians.
Training Infrastructure and Administrative Plan	ETP funds will not displace the existing financial commitment to training. The Company's annual training budget is approximately $2,000 for new employee orientation, safety training, coaching and new hire training. Safety training is provided in accordance with all requirements under state and federal law.
	Larsen Pumps has designated 2 staff members to oversee all administration and implementation of training. Staff is aware of all ETP record keeping requirements and is ready to begin training upon approval.
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	
All occupations identified (Attachment 1) will receive training in Business Skills, Commercial Skills, and Computer Skills as listed (Attachment 2).	

Delivery Method/Level	Productive Lab (PL)
Summary	
Hydraulic Lift Operators, Pump Technicians and the Lead Foreman will receive PL training in Commercial Skills. The trainer-to-trainee ratio shall not exceed 1:1 and PL training hours are capped at 24 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

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

Waivers	Description
Retention period for Ex-Offender	Full-time employment is required for a minimum of 30 hours per week during the consecutive 90-day employment retention period. Alternately, retention may be 500 hours within 180 days with one or more participating employers. Approval Justification: Larsen Pumps actively seeks to employ ex-offender candidates.

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	None selected to date	N/A	N/A
Administrative	None selected to date	N/A	N/A
Training	To be Determined	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	IntelliScanner System
Commercial Skills (Standard)	Drilling Rig
	Mobile Crane Operation
	OSHA 10
	OSHA 30
	Preparing the Well Site
	Water Pump
	Well Drilling
	Well Installation
	Well Maintenance
	Well Repair
Computer Skills (Standard)	IntelliScanner Inventory 2.0 software
	IntelliScanner Inventory Media 3.0 Software
	Inventory 2.0

Delivery Method /Level	Productive Laboratory		
Training Type (Level)	**Planned Course Offerings**		
Commercial Skills	Drilling Rig		
	Mobile Crane Operation		
	Preparing the Well Site		
	Well Maintenance		
	Well Pump		
	Well Repair		
PL Justification and Details			
Explain the need for productive laboratory (PL) training	Hydraulic Lift Operator, lead foreman, and Pump technicians will receive PL training. PL training will give the worker the skills necessary to complete the same task at other work sites.		
Describe the Equipment/Processes to be used in delivering the PL training	Mobile crane, drilling rig and well water pump		
Describe Trainer Qualifications	The owner will be the trainer.		
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

JMJK, Inc.

17-0952

Panel Meeting Date:	01/24/2018
Delegation Order Date:	12/26/2017
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:		$ 30,470.00	
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$ 30,470.00	N/A	$ 0.00	$ 64,900.00

APPLICANT PROFILE

Company Summary	Founded in 1990 and headquartered in Torrance, JMJK, Inc. (JMJK) is a lighting consultant representing manufacturers of premium architectural and decorative lighting products and landscape lighting.

Industry Sector(s)	Professional, Scientific, and Technical
Priority Industry	No
No. Employees (Applicant)	**State:** 40 **US:** 45 **World Wide:** 45
Turnover Rate (Applicant)	10.00 %
Repeat Contractor	No
High Unemployment Area	No

Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Training will improve job skills and knowledge to increase productivity and customer satisfaction.

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	37	$ 22.00	35	$ 770	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	2	$ 22.00	45	$ 990	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

JMJK is a full-service specification sales agency representing manufacturers of premium architectural and decorative lighting products and landscape lighting. The Company distributes decorative, landscape, and custom lighting; plans and designs environments; and provides product assembly, marketing, and sales strategies to architects, designer, hotels, and restaurants.

This proposal will include two of JMJK's affiliates: BrandJump LLC and J2MK LLC.

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	Because lighting trends are constantly changing, employees must continually train on new products, lighting fixtures and installation procedures, to manage customer needs. Product knowledge will assist employees to plan and present ideas, recommend appropriate fixtures and energy efficient lighting options, remain within budgets, and understand current building codes. Additionally, the Company must train employee in soft skills including customer relations, sales/marketing, and teamwork skill. These skills will help the Company increase customer satisfaction. Training will take place at the Company's location in Torrance and will be delivered by a combination of in-house subject matter experts and vendors to be identified during the term of the contract.
Training Infrastructure and Administrative Plan	ETP funds will not displace the Company's commitment to training. JMJK spends an estimated $45,000 annually on on-the-job training to employees. Safety training is, and will continue to be, provided by the Company in accordance with all pertinent requirements under state and federal law and ETP program requirements. 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 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

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 training in Business Skills, Computer Skills and Continuous improvement 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. Training for newly hired employees will be reimbursed at a higher rate, and trainees will be subject to a lower post-retention wage.

JMJK recently expanded its office by 4000 square feet to accommodate an increasing customer base. The Company has committed to hiring two new employees (Job Number 2). New employees are needed to handle data entry, customer service, merchandising, and account handling. 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

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 13.00% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing
Provided below are details on the types of training planned for this proposed Training Project.

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	**Planned Course Offerings**
Business Skills	Coaching/Communication
	Customer Relations
	Goal Setting
	Leadership
	Marketing/Business Development/ Sales
	Negotiation Skills
	Planning
	Product Knowledge
	Project Management
	Proposal Writing
	Teamwork
	Time Management
	Work Processes/Procedures
Computer Skills (Standard)	Adobe Creative Suite
	Autodesk AutoCAD, SolidWorks
	Customer Relationship Management (CRM)
	Dropbox
	Dynamics
	eCommerce
	Human Capital
	Payroll/Human Resources
	Scheduling System
	Google Drive
	Microsoft Office/Project
	OASIS
	Tablets/Handheld Equipment
Continuous Improvement Skills	Cost Reduction
	Kaizen
	Performance/Process/Quality/Productivity Improve
	Problem Solving/Six Sigma Process Controls/Root Cause Analysis
	Teambuilding
	5S
	Eliminating Waste/Improving Workflow
	ISO
	Workplace Design

TRAINING PROPOSAL FOR

JOHNNIE'S PAINT & BODY SHOP, INC.

17-0967

Panel Meeting Date:	01/24/18
Regional Office:	North Hollywood Regional Office
Analyst Name:	Elsa Wadzinski
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:		**$ 25,740.00**	
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$ 25,740.00	N/A	$ 0.00	$ 58,200.00

APPLICANT PROFILE

Company Summary	Johnnie's Paint & Body Shop, Inc. dba Fix Auto Pasadena and Montrose (Johnnie's), provides auto body collision repair services to consumers, insurers and fleet clients. The Company has existing relationships with USAA, Allied Nationwide and Geico insurance companies. Services include body repair, panel replacement, frame repair/ replacement and realignment, wheel-suspension diagnosis and replacement, advanced vehicle systems (active headlamps, active cruise control, lane keeping, radar systems, smart systems, advanced safety systems, blind spot systems) diagnosis and repair, auto refinishing, color matching, clear mask applications and alignments. The Company also provides towing and rental car services, and sells and installs aftermarket accessories.

Industry Sector(s)	Services (Other)		
Priority Industry	No		
No. Employees (Applicant)	**State:** 27	**US:** 27	**World Wide:** 27
Turnover Rate (Applicant)	9.50 %		
Repeat Contractor	No		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Training will focus on providing skills required to learn new technologies related to changing vehicle manufacturing methodologies and materials while ensuring safe repairs for consumers. Training will also address the Company's recent growth and lean oriented concepts, communication, teamwork, customer interaction/relationship building and sales to ensure customer satisfaction and increase profitability.

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	54	$ 1,188	8 - 100
1	Retrainee	14	$ 22.00	54	$ 1,188	8 - 100
2	Job Creation – Retrainee Initiative Program, Retrainee	6	$ 22.00	60	$ 1,320	8 - 100

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Johnnie's was founded in 2004. The Company has two locations, it's headquarters in Pasadena and a second facility in Montrose. Both locations will participate in training.

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 Company must train its workers in response to automobile industry changes related to new materials used to manufacture new vehicles. Many of these changes are being implemented to ensure that vehicles meet CAFE (Corporate Average Fuel Economy) standards. These changes require comprehensive, industry-specific training to meet ICAR (Inter-Industry Conference on Auto Collision Repair), ASE (Automotive Service Excellence) and OEM (Original Equipment Manufacturer) credentials which are required by most insurers and vehicle manufacturers. Training is also needed to use new equipment to properly assess vehicle damages related to new technology in the industry.
	Six Job Creation trainees will be trained on unique processes and documentation requirements to support business from new relationships with Farmers and State Farm insurance companies.
	Johnnies training budget is approximately $48,500 per year.
Training Infrastructure and Administrative Plan	The training and administration of the ETP project will be managed internally by Johnnie's Human Resources Manager. The Company is also utilizing Synergy Management Consultants to assist with the administration of the ETP project. The Company has a training plan in place and plans to train all staff on the program and maintaining rosters and other records.
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 training in Business Skills, Commercial Skills, Computer Skills and Continuous Improvement. Only Supervisors may receive training in Management Skills.	

Delivery Method/Level	Productive Laboratory
Summary	
Technicians and Estimators will receive Productive Lab training in Commercial Skills. Training will be delivered with a 1:1 trainer-to-trainee ratio.	

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
Increase in the cap for the maximum number of training hours allowed for a Small Business	Although Retrainees and Job Creation trainees will receive similar training, trainee training hours will vary based on experience and technology level. The Contractor is requesting a waiver to increase the maximum number of training hours cap for a Small Business from 60 hours to 100 hours to allow trainees to receive training needed proportionate to their experience.

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 Managment Consultants, LLC	Grass Valley	$ 2,500.00
Administrative	Synergy Managment Consultants, LLC	Grass Valley	13% of funds earned
Training	None selected to date	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	Conflict Resolution
	Customer Care Skills
	Customer Engagement
	Direct Repair Partner Management
	Educating the Consumer
	Overcoming Objections
	Presentation Skills
	Sales procedures and Strategies
	Understanding Financial and Operating Metrics
Commercial Skills (Standard)	3 Stage refinishing process
	3D measuring systems
	Active lane keeping systems
	Adhesive bonding
	Adv Materials and composite repair
	Aluminum bonding and structural repair
	Aluminum Tools and minor repair
	Collision Repair Skills
	Color sand/ polish/ de-nib surfaces
	Color Theory and matching principles
	Estimating mechanical and electrical systems
	Estimating hybrid and electrical vehicles
	Estimating steering and suspension damage
	Hybrid and electric vehicle repair
	Hybrid vehicle battery/ charging systems
	ICAR Collision Repair/ Refinish Skills
	Mig/TIG/ Resistance spot welding
	OEM Cert Toyota, Honda, VW, BMW, GM, Ford
	Pillars, rockers, floors, rail replacement
	Plastic and composite repair
	product knowledge
	R1234yf AC systems
	Refinish Skills
	Spray gun set up and maintenance
	Steering, suspension and mechanical systems
	Structural repair/ unibody alignment
	Surface preparation
	Vehicle Priming and Sealing
Computer Skills (Standard)	All Data application
	Car-O-Liner Measuring software

Attachment 2 - Training Delivery and Curriculum Listing

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

	CCC1 Software
	Fix Auto Software applications
	Mitchell Estimating
	MS Office Intermediate/ Advanced
	OEM Repair Process Retrieval
	Parts Trader- Parts Procurement software
	Quickbooks
	Repair Scanning Software
	Tesla Estimating/ parts software
	VOC Tracking
Continuous Improvement Skills	Emergency Clean up Procedures
	Handling chemicals and clean up procedures
	Just-in-time Inventory control/ protocol
	Lean Process and Integration
	Managing MSDS sheets
	Problem Solving and decision making skills
	Quality Assurance
	Root Cause Analysis
	Standard Operating Procedures
	Team Building
Management Skills	Coaching Skills for supervisors
	Collaborative Leadership
	Creating Business Strategy
	Employee Engagement
	Understanding Finance and operational Metrics

Delivery Method /Level	*Productive Laboratory*
Training Type (Level)	**Planned Course Offerings**
Commercial Skills	3 Stage color match PL
	3D measuring set up/ analysis PL
	Aluminum Bonding PPL
	Aluminum Repair PL
	Aluminum Welding PL
	Body Filler Methods PL
	Color Blending PL
	Color Tinting PL
	Estimating advanced vehicle systems PL
	Estimating Diagnosis PL
	Estimating Adv materials composite struct PL
	Estimating DRP procedures new tech PL
	Mig Brazing PL
	Rivet Bonding PL

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

	Scanning analysis PL
	Structural corrections with 3D measuring PL
	Structural Welding PL

PL Justification and Details	
Explain the need for productive laboratory (PL) training	Productive lab is needed as technicians and estimators coming into the industry lack hands-on training. Even those who have attended vocational schools such as Wyotech or UTI lack substantial hands-on training and skills necessary to perform job functions Johnnie's has found that when these employees enter the workforce, they must be trained in a 1:1 Trainer-to-Trainee environment with journey level technicians. PLT will allow Johnnie's to use master trained employees and subject matter experts to train new technicians.
Describe the Equipment/Processes to be used in delivering the PL training	Equipment to be used will be resistance spot welders, mig (metal inert gas) welders, frame rack and measuring system, spray guns, spray booths, various hand tools, All-data IT, estimatics for estimators including Mitchell, CCC systems and CCCOne Software. OEM manufacturer specific, and Snap-On scanners.
Describe Trainer Qualifications	The trainer role is to explain process/tools/expectations and standards as well as coach techniques, mentor and support the student to ensure proficiency. Trainers will be journey level technicians with the level of experience necessary to facilitate expected outcome. 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	1
Ratio for Maximum Ratio When More than One Class	1	2
PLT Approval	Yes	

TRAINING PROPOSAL FOR

Labeltronix, LLC
18-0598

Panel Meeting Date:	01/24/18
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:		$ 49,920.00	
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$ 49,920.00	N/A	$ 0.00	$ 49,270.00

APPLICANT PROFILE

Company Summary	Labeltronix, LLC (Labeltronix) (www.labeltronix.com) manufactures custom full-color labels for customers in the wine, craft beer, spirits, medical, nutraceutical industries, and a variety of other industries requiring primary product labels.

Industry Sector(s)	Manufacturing
Priority Industry	Yes
No. Employees (Applicant)	**State:** 84 **US:** 84 **World Wide:** 84
Turnover Rate (Applicant)	12.70 %
Repeat Contractor	Yes
High Unemployment Area	No

Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Labeltronix plans to deliver a comprehensive training package to provide its workforce the skills to successfully support the Company's new and upgraded equipment and software systems.

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	66	$ 26.00	20	$ 520	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	10	$ 26.00	60	$ 1560	8 - 80

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 1993, Labeltronix got its start as a distributor of product identification labels, label supplies, and industrial labeling equipment. In 2004, the Company purchased its first printing press and began manufacturing labels for sale while maintaining the distribution side of the business. In 2011, Labeltronix moved into a 50,000 square-foot printing plant in Anaheim, and in 2015, the Company began selling the new Epson full-color label printer, an equipment capable of producing commercial grade labels on demand.

Training will occur at its single facility located in Anaheim.

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 the second agreement between ETP and Labeltronix, and the second in the last five years. In its previous agreement, the Company provided a training in business, computer, continuous improvement, and manufacturing skills to its entire workforce. Training focused on improving skills necessary to utilize new equipment and closing skills gaps in all phases of its manufacturing processes and procedures.
	Company representatives report that the label printing industry remains highly competitive as customers continue to seek lower prices with higher quality labels. Labeltronix must continually invest in technological advancement as well as cutting-edge printing equipment in order to support customer demands, grow its business, and remain at the forefront of the marketplace.
	To realize this goal, Labeltronix recently invested $500K to acquire and implement the following technological changes:
	• New Enterprise Resource Planning (ERP) System, LabelTraxx, a system designed to specifically support label manufacturing. This system will provide Labeltronix better processing tools to improve process analysis and become more efficient;
	• Upgrade of the existing ERP, NAV System, which was initially geared toward the distribution industry. The upgrade from version 2005 to 2018 will allow subsystems to be upgraded. Currently, the entire system is outdated and in danger of losing support;
	• New attachment to finishing equipment to be able to screen print labels apply more ink or varnish on a label than printing

PROPOSED TRAINING PROJECT DETAILS

	presses will allow. The additional ink or varnish produces a "high build" resulting in a raised image without embossing and producing a different luster; • Upgrade Advanced Vision Technology (AVT) systems and digital printers (HP Indigo) to allow for automated color adjustments. This upgrade will keep color consistent between presses, boosting operator efficiency. One of the two HP Indigo printers will be upgraded to allow Labeltronix to digitally top coat materials. This feature will reduce material cost and allow the Company to use additional materials that were not previously compatible with the HP Indigo printers. The strategic plan mentioned above will require the Company to provide its workers with additional skills to fully support improved and new product and service offerings as well as successfully meet customer expectations. With the help of ETP funding, Labeltronix will be able to provide extensive formalized training to ensure its workers have the appropriate skills to support the Company's effort in improving its technological processes to remain competitive in the industry.
Training Infrastructure and Administrative Plan	Labeltronix designated its Human Resources Specialist to administer the training program and its Chief Financial Officer to oversee the entire administration of the ETP project. Together, they will meet with ETP staff during monitoring activities. Training will be delivered by both in-house trainers and outside vendors to be determined during the training period of the proposed agreement. HR Staff will advise ETP if an outside vendor has been selected and acquired. Equipment manufacturers will provide training services (for a fee) to the Company's managers, supervisors, and/or lead personnel who will become subject-matter experts.
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, Hazardous Materials, and Manufacturing Skills will be provided to approximately 76 existing and newly-hired workers (Administrative, Customer Service, Production, Sales, Supervisor/Manager, and Owner).	

Delivery Method/Level	Productive Laboratory
Summary	
Training in Manufacturing Skills will be provided to approximately 48 Production Staff.	

4. Additional Company or Training Project Details

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

Retrainee – Job Creation

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

To support expansion of product offerings and support the business needs of its existing customer base, Labeltronix has committed to hire approximately 10 new employees: one Accounting Staff; one Production Staff; four Customer Service, Marketing, and Sales Staff; and four Press Operators (Group 2). The date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. The Company also represents that these trainees will be hired into "net new jobs" as a condition of contract.

4.1 Program Waivers

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

Waivers	Description
Increase maximum training hours for Job Creation (Group 2)	Although the standard range of hours for Small Business is 8-60 hours, Labeltronix requests an increase in the maximum hours from 60 to 80 training hours, an average of 60 hours for Job Creation trainees to allow workers to receive a significant amount of technical skills training in new and existing technologies as well as processes specific to the label printing environment.

PROPOSED TRAINING PROJECT DETAILS

Waivers	Description
Out-of-State Vendor	Labeltronix plans to deliver Manufacturing Skills training in operating its newly acquired HP Indigo digital press printer. The Company acquired its new equipment and software as well as the upgrades and add-ons to its existing printing presses from HP Indigo. HP Indigo manufactures these printers and is the proprietary vendor of the digital printing presses. HP Indigo Technicians are trained and equipped to deliver comprehensive training on this equipment and are the only trainers who can deliver this specialized training. As such, Labeltronix requests to utilize HP Indigo, an out-of-state vendor, to deliver the aforementioned training. HP Indigo's training program is designed specifically to successfully operate the equipment's full capabilities in order to further optimize Labeltronix's overall manufacturing processes.

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	None selected to date	N/A	N/A
Administrative	None selected to date	N/A	N/A
Training	Indigo America	Alpharetta, GA	$ 8,000.00

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
ET14-0268	Anaheim	2/3/14 – 2/2/16	$47,112	$44,395	94%
Notes	Labeltronix retained 77 trainees of the planned 60 (more than 100%) who completed retention.				

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	**Planned Course Offerings**
Computer Skills (Standard)	LabelTraxx Accounts Payable
	LabelTraxx Accounts Receivable
	LabelTraxx Estimating
	LabelTraxx General Ledger
	LabelTraxx Integration between systems
	LabelTraxx JDF Link and e-Traxx
	LabelTraxx Job Costing
	LabelTraxx Order Processing
	LabelTraxx Quality Control
	LabelTraxx Stock Products Maintenance
	LabelTraxx Visual Scheduling
	NAV Upgrade
Continuous Improvement Skills	Departmental Best Practices & Procedures
	Quality Systems Testing & Inspection
	Work Order Interpretation Instructions
Manufacturing Skills (ME) (Standard)	Printer Press Operation
	Process Setup Optimization Skills
	Waste Reduction Skills

Delivery Method /Level	Productive Laboratory
Training Type (Level)	**Planned Course Offerings**
Computer Skills (Standard)	LabelTraxx Accounts Payable
	LabelTraxx Accounts Receivable
	LabelTraxx Estimating
	LabelTraxx General Ledger
	LabelTraxx JDF Link and e-Traxx
	LabelTraxx Job Costing
	LabelTraxx Order Processing
	LabelTraxx Quality Control
	LabelTraxx Stock Products Maintenance
	LabelTraxx Visual Scheduling
	LabeTraxx Integration between systems
	NAV Upgrade
Manufacturing Skills (ME) (Standard)	Printer Press Operation
	Process Setup Optimization Skills
	Waste Reduction Skills
PL Justification and Details	
Explain the need for productive laboratory (PL) training	Labeltronix produces and sells custom labels. Each label has different material, dimensions, content, and finishing. Training requires both classroom and productive lab to ensure the employees know how to enter the information correctly so the product is produced correctly.

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

	Incorrect product production risks the loss of customers and market share. Custom labels have many variations that it is often difficult to bring up every circumstance a trainee will face. Most productive lab training will be delivered 1:1 but may be delivered up to 1:3. Labeltronix found that with the multitude product configuration possibilities, requires having more than one trainee doing hands-on processing and collaborating.		
Describe the Equipment/Processes to be used in delivering the PL training	Printing equipment, finishing equipment and quality inspection equipment require PL training, Computer software training is customer and product specific also, so personal computers will be used for PL training to ensure employees are completely and properly trained on the software.		
Describe Trainer Qualifications	Trainers are either software vendors, equipment vendors, or Labeltronix Managers and Supervisors that have been thoroughly trained by the software vendors and equipment manufacturers.		
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

Life-Assist, Incorporated

17-0541

Panel Meeting Date:	01/24/2018
Regional Office:	Sacramento Regional Office
Analyst Name:	Karen Mam
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:		$34,980.00	
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$34,980.00	N/A	$0.00	$46,076.00

APPLICANT PROFILE

Company Summary	Life-Assist, Incorporated (Life-Assist) distributes emergency medical supplies and equipment for First Responders, Paramedics, Emergency Medical Technicians and Emergency Medical Services Providers.

Industry Sector(s)	Trade (Wholesale)		
Priority Industry	No		
No. Employees (Applicant)	**State:** 47	**US:** 55	**World Wide:** 55
Turnover Rate (Applicant)	4.00 %		
Repeat Contractor	No		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Training will focus on improving customer service, leadership and communication 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	Owner, Retrainee	1	$22.00	30	$660	8 - 60
1	Retrainee	40	$22.00	30	$660	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	6	$22.00	60	$1,320	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1977 and headquartered in Rancho Cordova, Life-Assist provides a full line of emergency medical products to fire departments, ambulance companies, law enforcement agencies, and search and rescue teams. The Company distributes products such as trauma and first aid supplies, pharmaceuticals, and protective care. All training will be conducted at its single facility in Rancho Cordova.

2. Current Training Project Details

Purpose of Training	This is Life-Assist's first ETP Agreement. As the Company experiences a growth in business due to market demands and business development strategies, Life-Assist will implement a training program focused on communication, sales and marketing, customer service, and leadership and management training. Training will improve customer service skills and communication skills in order to increase sales. The Company has also recently invested $125K on a new Warehouse Management System. Training under this proposal will allow the Company to optimize warehouse and distribution of its products.
Training Infrastructure and Administrative Plan	Life-Assist's Project Manager and two staff members will oversee and coordinat all training efforts, including scheduling and tracking training. Training will be delivered by In-house experts and vendors as needed.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

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

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

PROPOSED TRAINING PROJECT DETAILS

4. Additional Company or Training Project Details

Retrainee - Job Creation

This program provides incentives to companies that commit to hiring new employees including a higher Reimbursement Rate:

- $22 for all delivery methods, except for CBT, which is reimbursed at $8 per hour.

Business has grown approximately 20% over the last year and the Company is projecting continued growth for 2018 as well due to new customer acquisition. Life-Assist will require additional staff to support the increase in business. The Company will hire Customer Service and Operation Support Staff.

Life-Assist has committed to hiring six new employees under Group Number 2. To qualify for Job Creation, trainees must be hired within the three-month period in "net new" jobs prior to Panel approval or during the term of contract.

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 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	Business Ettiquette
	Effective Communication
	Leadership and Coaching Skills
	Marketing Skills
	Sales Skills
	Team Building
Computer Skills (Standard)	Computer Programming
	Microsoft Office Suite (Intermediate/Advanced)
	Resource Planning
	Tax Automation Software
	Warehouse MGMT System

DELEGATION ORDER

Retrainee - Job Creation
Training Proposal for:

M3 HVAC dba M3 Mechanical

Small Business

ET18-0146

Approval Date: December 12, 2017

ETP Regional Office: San Diego   **Analyst:** H. Bernard

CONTRACTOR

- Type of Industry: Manufacturing

  Priority Industry: ☒ Yes ☐ No

- Number of Full-Time Employees

                 California: 26

                 Worldwide: 26

  Number to be trained: 31

  Owner ☒ Yes ☐ No

- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET):   ☐ Yes ☒ No
- High Unemployment Area (HUA):   ☐ Yes ☒ No
- Turnover Rate: 10%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $34,840
- In-Kind Contribution: $36,180

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 Priority Rate	Business Skills Commercial Skills Computer Skills OSHA 10/30 PL - Comm Skills	26	8 - 60 Weighted Avg: 40	N/A	$1,040	$17.22
2	Retrainee Job Creation Initiative SB <100 Priority Rate	Business Skills Commercial Skills Computer Skills OSHA 10/30 PL - Comm Skills	5	8 - 60 Weighted Avg: 60	N/A	$1,560	$14.35

- Reimbursement Rate: $26 SB Priority

- County(ies):   Orange

- Occupations to be Trained: Administrative Staff, Owners, Installation/Service Technicians

- Union Representation: ☐ Yes

                                        ☒ No

- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: The Company has retained Welsh Advisors in Anaheim for development services for a flat rate of $2,439.

- Administrative Services: The Company has retained Welsh Advisors in Anaheim for Administrative Services not to exceed 13% of payment earned.

- Training Vendors: To Be Determined

OVERVIEW

M3 HVAC dba M3 Mechanical (M3) is a full service commercial heating, ventilation & air conditioning (HVAC) company. Most of the Company's business is dedicated to manufacturing: carbon & stainless steel, aluminum alloys, copper, plastics and other materials. The other part is designing and installing HVAC equipment for customers. M3 also works with customers on large specialized business projects, requiring technicians to design and assemble complex HVAC systems.

Need for Training

Recently, M3 has secured several new contracts throughout California, leading to a 25% increase in company revenue. In addition to the company's growth, there have been significant changes in the industry. Many of M3's customers are requesting more energy efficient HVAC systems, requiring employees to be knowledgeable of new, complex control systems designed to reduce power usage. These new technologies include geothermal heat pumps that utilizes heat from the earth to warm a space, smart thermostats that automatically regulate a room's temperature when people leave the room, and smart HVAC systems programmed to self-diagnose and repair problems/issues without human intervention. Substantial growth coupled with new and quickly advancing technologies requires that the Company provide ongoing training to ensure employees are up to date on the latest technological trends in order to provide the best customer service.

Additionally, M3's staff must be knowledgeable on fabrication, installation, maintenance, and reconfigurations for thousands of parts that require electrical, mechanical, and construction expertise.   Installation of these parts require knowledge in building codes & regulations, clearances and specific requirements since most of the M3's business revolves around custom HVAC systems.

Training Plan

Training will be performed for all staff at M3's facility and will be provided by a mix of internal subject-matter experts and vendors. Currently Company staff receive 40-50 hours of training annually. ETP funds will help formalize its already extensive training plan. Much of the training will be provided in Commercial Skills for Installation/Service Technicians.

Business Skills: This training will be offered to Administrative Staff and will include project management skills, report writing, finance/accounting skills and customer service. This training will help increase productivity and efficiency.

Commercial Skills: This training will be offered to Installation/Service Technicians and Owners and will be the bulk of the training provide under this project. Training will include equipment diagnostics and maintenance, HVAC skills training, environment technology & controls. Training will also cover new building codes, emerging HVAC technologies, and extensive product knowledge to ensure that the technicians are familiar with all products and services.

Computer Skills: Training will be provided to all staff. Training for Administrative Staff will include Microsoft Office Suite, controls software, and accounting software. All staff will receive training in project management software.

Productive Lab

M3 is requesting Productive Lab (PL) training for Installation/Service Technicians. M3 plans to train 10 technicians, 5 of which will be new employees. All training will be delivered at the Company's site in Orange County and will have a trainer to trainee ratio of 1:1. During PL, training production output will be significantly reduced and the trainers' time will be dedicated only to training. PL will not exceed 24 hours per trainee.

Most of the PL training will focus on equipment including HVAC and refrigeration, equipment production, installation, troubleshooting, gas/heating furnace controls, direct digital controls and building automation fundamentals. Trainees will also learn welding, and how to operate brand

specific equipment. PL is required since equipment being used is too large to transport into the classroom.

Certified Safety Training

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

Retrainee/Job Creation

Due to the growth discussed above, M3 will be expanding existing business capacity by adding newly-hired employees to an existing job function. M3 expects to hire 10 new employees in the next 2 years but is only including 5 new Installation/Technicians in the ETP project. M3 represents that these staff will be "net new hires".

<u>RECOMMENDATION</u>

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 60   Trainees may receive any of the following:

        COMMERCIAL SKILLS
- Building Codes & Regulations
- Product Knowledge
- Standard Operating Procedures
- HVAC Skills Training
  - Welding – Copper, Steel
  - Condensation Lines
  - Water Lines
  - New and Upgraded Thermostat
  - Electricity/Voltage & Schematics
  - Heat Pumps
  - Mechanical Refrigeration
- Environment Technology/Controls
- Equipment Diagnostics/Maintenance
- Blueprint Reading

        COMPUTER SKILLS
- Microsoft Office Suite
- Controls Software
- Accounting Software
- Project Management Software

        BUSINESS SKILLS
- Project Management
- Report Writing
- Finance/Accounting Skills
- Customer Service Skills

        CERTIFIED SAFETY TRAINING (OSHA Certified Trainer)
- OSHA 10 (requires completion of full 10-hour course)
- OSHA 30 (required completion of full 30-hour course)

Productive Lab Hours

0 – 24   Trainees may receive any of the following:

        COMMERCIAL SKILLS (Training Ratio 1:1)
- HVACR Heating, Ventilation, Air Conditioning Refrigeration Procedures (HVACR)
- Economizer Installations and Troubleshooting
- Compressor Installation
- Replacing Contactors
- Replacing Blowers
- Unit Troubleshooting

- Welding, Brazing and Sweating Pipe
- Reclamation of Refrigerant
- Evacuation of a Refrigeration System
- Retrofit of a Roof Top Unit
- Monitoring Safety Switches
- Electronic Timers & Sequencers
- Gas/Heating Furnace Controls & Electronics
- Heat Pump
- Building Automation Fundamentals
- Direct Digital Controls & Electronics

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery. PL is capped at 24 hours per-trainee.

TRAINING PROPOSAL FOR

Mark Scheurer Architect, Inc.

18-0620

Panel Meeting Date:	01/24/2018
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: $23,712.00			
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$23,712.00	N/A	$ 0.00	$23,693.94

APPLICANT PROFILE

Company Summary	Mark Scheurer Architect, Inc. (MSA) is an architectural design and planning firm. MSA specializes in master-planned communities, hospitality and resorts, residential housing, retail/mixed-use, space planning as well as land-use planning.

Industry Sector(s)	Professional, Scientific, and Technical		
Priority Industry	Yes		
No. Employees (Applicant)	**State:** 18	**US:** 18	**World Wide:** 18
Turnover Rate (Applicant)	4.00%		
Repeat Contractor	No		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Training will provide workers with the necessary skills in Commercial and Computer skills to learn the lastest sustainability and design features, building codes, and software to meet the requirements of its growing customer-base.

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	41	$1,066	8 - 60
1	Retrainee	17	$26.00	41	$1,066	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	3	$26.00	58	$1,508	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Established in 1997 and located in Newport Beach, MSA provides architectural services to commercial and residential clients worldwide. The Company specializes in master-planned communities, hospitality and resorts, residential housing, (including multifamily, luxury single family, custom residences, apartment and golf course communities), retail/mixed-use, senior and retirement communities, as well as space planning and land-use planning.

This will be MSA's first ETP Contract.

2. Current Training Project Details

Purpose of Training	MSA has recently experienced growth in its customer-base, which has allowed it to expand its services to include boutique hotels, resorts, golf clubhouses, and high-rise residential. With this growth, comes new customer demands, such as the introduction of a variety of new materials and design methods that are driven by environmental concerns. This shift from building aesthetics to sustainable design requires employees to incorporate new design elements into its projects.
	Additionally, new and revised building codes and regulations significantly impact the Company's design process. Building codes continually evolve new technology, changing risk awareness. The skills required to develop architectural designs that comply with changing codes and regulations change over time, and MSA must incorporate new code requirements into its designs.
	To adequately respond to these changes, workers require training in Commercial and Computer Skills to provide them with the engineering and design trends required to meet customer demands. Commercial Skills training will include comprehensive knowledge of building codes and standards to ensure that the Company address the most recent government requirements and concerns in its designs.
	Training in Computer Skills will provide employees with the ability to use software tools and features that are essential to the stages of the design process, such as Revit and BIM software, AutoCAD, Accounting and MS Office software.
	Lastly, new employees will need to be trained in the same skills as existing employees, as well as architectural practices, tools, and processes. This training will provide new employees with industry standards, common practices in design, unfamiliar tools used by the firm, and efficient collaborative work processes.
	Training will be provided by in-house experts and vendors as needed.

PROPOSED TRAINING PROJECT DETAILS

Training Infrastructure and Administrative Plan	The Company's Business Manager will oversee all administration functions, including enrolling trainees, scheduling training, collecting rosters, uploading eligible training hours and other administrative tasks. Welsh Advisors will also assist with administration.
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 Commercial and Computer 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 reimbursed at a higher rate and trainees will be subject to a lower post-retention wage.

MSA is growing its customer base and expanding its services. In order to accommodate these changes, the company will add 3 new employees over the term of the contract. MSA understands that trainees must be hired into net-new jobs.

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

MSA has retained the services of the following Subcontractor.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Welsh Advisors, Inc.	Anaheim	$2,845.44
Administrative	Welsh Advisors, Inc.	Anaheim	13.00% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 provide 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**
Commercial Skills (Standard)	Building Codes and Updates
	Human Resources Training
	LEED Training
	Practices, Tools and Processes,
	Product, Engineering and Design Trends
Computer Skills (Standard)	Revit BIM CAD (Built Information Modeling – 4D)
	Accounting Software
	Autocad
	Microsoft Office

TRAINING PROPOSAL FOR

Method Technologies Inc.

18-0543

Panel Meeting Date:	01/24/2018
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:		**$29,900.00**	
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$29,900.00	N/A	$0.00	$75,992.00

APPLICANT PROFILE

Company Summary	Method Technologies Inc. (MTI) provides IT and technology-related services, such as help desk support, web design, web hosting, structured cabling, virtualization, and other technology solutions.

Industry Sector(s)	Professional, Scientific, and Technical		
Priority Industry	Yes		
No. Employees (Applicant)	**State:** 30	**US:** 30	**World Wide:** 30
Turnover Rate (Applicant)	5.00%		
Repeat Contractor	Yes		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Training will focus on Computer skills, the majority of which are in technical skills related to server installation and hosting, help desk, virtualization, phone systems, and cloud services. The Company will also provide training in Business skills such as: customer service, administrative duties, quoting, purchasing, sales, and other related topics.

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	50	$1300	8 - 60
1	Retrainee	22	$26.00	50	$1300	8 - 60

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 2007 and headquartered in Cypress, Method Technologies Inc. (MTI) provides various IT and technology-related services including virtualization, surveillance, 24/7 monitoring, telecom, and technology relocation. The Company primarily serves clients in Southern California. However, it has several out-of-state clients in Texas, Florida, and New York.

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 focus of first ETP project was to implement standard operational procedures and create a formalized, structured training program. This new proposal will focus on training in new technologies, including training in backup monitoring system, new maintenance procedures to use the Company's automation system, and proactively defending and protecting clients from Ransomware.
	MTI is experiencing changes driven by customer demands and changing industry standards. MTI's customers demand new technology solutions with new and growing security risks like Ransomware, customers need MTI's services to proactively defend and protect them.
	As a result, Method Technologies continually implements new solutions that take advantage of the latest advancements in the field.
	To meet customer needs and remain competitive, MTI will deliver the following Business and Computer skills to its Administrative, Engineering, Help Desk, Owner, and Managers/Supervisors:
	Business Skills are needed for trainees to properly interact with clients that are call in for support. Technical expertise coupled with great customer service skills are essential when interfacing with customers. In addition, trainees must be able to better understand the Company's systems and be able to offer the best solutions for MTI's customers.
	Computer Skills are needed as all trainees must have knowledge of MTI's solutions and understanding of technology so they can effectively perform their core job functions of solving computer issues, provide hardware and software support, quote and sell customized design proposals, and solve client issues. Trainees must be able to provide the most cost effective solutions.
	MTI is investing in new technology to enhance its ability to serve its customer base, while staying at the forefront of technological advancements. This includes new servers, network switches, and a

	new form of storage device for backup and disaster recovery clients.
Training Infrastructure and Administrative Plan	The Owner and Administrative Manager will provide project administration. The Company is knowledgeable of ETP's recordkeeping and administrative requirements through experience in its first ETP project. Training Funding Source will provide assistance in project administration. Training will be conducted by in-house trainers with some vendors to be determined later.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	Although this is the second ETP project for Method Technologies, the Company has earned less than $250,000 for retrainees in the previous five years at the same facility. Therefore, Substantial Contribution does not apply to this proposal.

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 class/lab training in Business and Computer Skills topics 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	Training Funding Source	Seal Beach	$ 1,900.00
Administrative	Training Funding Source	Seal Beach	13% of funds earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

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
ET16-0237	Cypress	11/3/15-11/2/17	$48,100	$39,133	81%
Notes	MTI has reported a total of 85% of eligible training hours in the ETP Tracking system for 26 trainees. The closeout invoice will be submitted within 30 days of the end term date of the contract. MTI anticipates earning 100% of approved funding.				

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	Customer Acquisition / Sales
	Customer Interaction/Quality Control
	Office Equipment Operations
	Proposal Procedures
	Standard Business Operating Procedures
	Workplace Privacy
Computer Skills (Standard)	Backup Disaster Recovery (BDR) Systems
	Databases
	Email Providers and Services
	File Sharing
	Hardware – Configuration and Troubleshooting
	Networking
	Powershell Scripting
	Security Products (AV, Encryption, etc)
	Service Standards and Technical Operating Procedures
	Software – Configuration, Use and Troubleshooting
	Storage Solutions (SAN, NAS, etc)
	Surveillance
	Telephony and Paging
	Uninterruptible Power Supply (UPS)
	Virtualization
	Website Hosting
	Wiring
	Workstations - Loading, Configuring, and Troubleshooting
	Servers – Loading, Configuring, and Troubleshooting

TRAINING PROPOSAL FOR

NAC Insurance Administration Corporation
dba CalNonprofits Insurance Services
18-0594

Panel Meeting Date:	01/24/2018
Regional Office:	San Francisco Bay Area Regional Office
Analyst Name:	Samantha Wang
Type of Proposal:	Single Employer (SB), Small Business Program
Funding Source:	SET

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		$ 45,144.00	
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$ 45,144.00	N/A	$ 0.00	$ 92,720.00

APPLICANT PROFILE

Company Summary	NAC Insurance Administration Corporation dba CalNonprofits Insurance Services (CIS), (http://calnonprofitsinsurance.org) provides insurance products, customer service, and insurance education to nonprofit organizations in California.

Industry Sector(s)	Finance & Insurance
Priority Industry	No
No. Employees (Applicant)	**State:** 38 **US:** 38 **World Wide:** 38
Turnover Rate (Applicant)	0.00 %

Repeat Contractor	No
High Unemployment Area	No
Union(s)	No

TRAINING PROFILE

Training Objective(s)	With technical changes and policy revision to the Afforadable Care Act (ACA) Legislation, CIS needs ETP funds to expand its business capabilities to various markets to increase its customer base and revenue. In addition, CIS will be implementing an information management system, Electronic Privacy Information Center (EPIC), in order to operate more efficiently.

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	38	$ 22.00	54	$ 1188	8 - 60

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 1984 and headquartered in Capitola, CIS, seeks ETP funding for retraining. As a subsidiary of the California Association of Nonprofits (CalNonprofits), the Company provides insurance products, customer service, and insurance education to nonprofit organizations in California. Through a consultation process, CIS offers a variety of cost-saving employee benefits, workers compensation, general liability coverages, and exclusive nonprofit insurance programs to its customer.

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	Recently, CIS has encountered two factors that impacted the company's business performance and sales: 1) changes resulting from technology and 2) changes in the ACA.
	Changes in technology has disrupted the conventional broker/ carrier relationship by forcing individuals in the insurance industry to change operating models and adopt new technologies. This has forced CIS to adjust from a paper based to computer based business.
	Therefore, CIS needs to implement the following system:
	• EPIC - An information management system that manages and supports all aspects of business operations and performances effectively. With this system, staff will be able to gather company financial data and client information to securely transfer both from one portal to another.
	The changes in the ACA over the past two years lowered and standardized commissions on insurance plans. Therefore, CIS has to pursue more business in order to maintain revenue.
	CIS is seeking other market segments to meet this goal. Previously, CIS's main focus was the employee's health benefit plans, such as Group Medical Insurance and Group Disability Insurance. Due to the lowered commissions to these plans, CIS is expanding into the Property and Casualty segment such as Worker's Compensation, General Liability, and Risk Management.

	To gain better communication skills and work efficiencies, Administrative, Customer Service, and Operations Staff will receive training in Business and Computer Skills. Managers will receive training in Management Skills to better supervise staff on how to sell the products.
Training Infrastructure and Administrative Plan	Class/Lab training will be delivered at CIS's Capitola facility by qualified internal staff and external vendors, to be determined. Contract Representative, along with each department manager, will be responsible for scheduling and tracking training. The Company has retained a third party consultant 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	
Administrative, Customer Service, and Operations Staff will receive training on Problem Solving Skills, Negotiation Skills, and on the EPIC System. Managers will receive training on Coaching, Leadership, and Decision Skills. The training will ensure that all staff will have thorough knowledge, skills, and abilities to be able to execute all business procedures.	

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	Human Systems Consulting	San Diego	$ 4,000.00
Administrative	Human Systems Consulting	San Diego	13% of project earnings
Training	To be determined	To be determined	To be determined

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	Human Relations Skills
	Organizational Skills
	Problem Solving Skills
	Selling/Negotiation Skills
Computer Skills (Standard)	EPIC System
Management Skills	Coaching Skills
	Leadership Skills
	Planning/Buisnesss Knowledge Skills
	Problem Solving and Decisions Skills
	Team Building

TRAINING PROPOSAL FOR

Paragon Products Limited, LLC

17-0553

Pane Meeting Date:	01/24/2018
Regional Office:	Sacramento Regional Office
Analyst Name:	Jana Lazarewicz
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:		$12,792.00	
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$12,792.00	N/A	$0.00	$13,000.00

APPLICANT PROFILE

Company Summary	Paragon Products Limited, LLC (Paragon) designs and manufactures electromechanical fluid management systems for large diesel engines and heavy equipment.

Industry Sector(s)	Manufacturing
Priority Industry	Yes
No. Employees (Applicant)	**State:** 63 **US:** 63 **World Wide:** 63
Turnover Rate (Applicant)	18.00 %
Repeat Contractor	No
High Unemployment Area	No
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Paragon has invested in new equipment and software upgrades, and will train staff in processes that will increase productivity, capacity, and the technical expertise of their staff.

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	12	$312	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	2	$26.00	12	$312	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 2008 and headquartered in El Dorado Hills, Paragon is a manufacturing company specializing in fluid control solutions for large diesel engines and heavy equipment such as bulldozers, backhoes and trains. The Company's products include fuel transfer pumps, pre-lube pumps, diesel engine coolant pumps, and pressure relief valves. In addition, Paragon offers custom products designed to meet customer needs. Its products are used worldwide by clients such as General Electric Transportation Services, Union Pacific Railroad, Cummins, CSX and Electro-Motive.

Paragon has two facilities in El Dorado Hills, both of which will participate in the training proposal. This will be the Company's first ETP Agreement.

2. Current Training Project Details

Purpose of Training	Paragon reports a continued increase in demand for electromechanical fluid management systems for large diesel engines and heavy equipment applications. Many railroad and heavy equipment companies look to Paragon to develop or engineer a fluid control solution and to build the equipment onsite to meet their needs. Staff must possess the skills necessary to bring concepts to a reality. To keep up with industry demands, the Company is developing ways to increase productivity and improve operation efficiencies.
	Paragon recently invested in new machinery including new cranes and a water pump assembly. Automation requires workers to be trained in technological and process improvement skills to be more efficient and productive in their roles. Additionally, the Company implemented new test standards for quality assurance testing throughout the production process. Training will be provided to ensure staff are able to meet company qualify guidelines.
	Furthermore, Paragon recently upgraded its Enterprise Resource Program system, to improve business operations. Training is necessary to give employees the tools necessary to navigate the system and improve proficiencies.
Training Infrastructure and Administrative Plan	Paragon has designated its Human Resources Manager and Office Coordinator to plan and oversee all aspects of training. The Company also has a designated person in each department to assist with training documentation. Training will be delivered by in-house experts.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A

PROPOSED TRAINING PROJECT DETAILS

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, Computer, Continuous Improvement, Hazardous Materials, Manufacturing and Management Skills topics listed under Attachment 2, Exhibit B.	

Delivery Method/Level	E-Learning - Computer Based Training (CBT)
Summary	
All occupations will receive Computer-Based Training (CBT) in Business, Computer, and Manufacturing topics listed under Attachment 2, Exhibit B. CBT will not exceed 50% of a trainees total training hours and CBT is capped 25 hours per trainee.	

4. Additional Company or Training Project Details

Retrainee – Job Creation

Paragon has seen an increase in its customer base and demand for products due to recent product innovations that meet new emission standards. In response, the Company is committed to hiring two new full-time employees (Engineer and Production Staff). The date-of-hire for all trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

Paragon has retained the services of the following Subcontractor.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	RSM US LLP	San Diego	$ 1,279.00
Administrative	None selected to date	N/A	N/A
Training	To be Determined	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	**Planned Course Offerings**
Business Skills	Accounts Receivable
	Customer Service Training
	Document Control
	New Product Development and Product Specification
	Order review entry and scheduling
	Product Knowledge
	Purchasing
	Supplier Selection and Management
Computer Skills (Standard)	ERP Applications
	Excel Intermediate & Advanced
	Geometric Dimensioning and Tolerancing
	Solid Edge
	Solid Works
Continuous Improvement Skills	APICS/CPIM
	ISO Quality Management System Awareness Training
	Six Sigma Black Belt
	Six Sigma Green Belt
Hazardous Materials Skills	Hazard Communication
	Hazardous Waste
Management Skills	Coaching and Motivation
	Communication Skills for Leaders
	Effective Supervision
	Leadership Skills
	Teambuilding
Manufacturing Skills (ME) (Safety)	Compressed Gas Safety
	Corrective and Preventative Action
	Electrical Safety
	Forklift Safety
	Hot Pump Procedures
	Spill Prevention and Control
Manufacturing Skills (ME) (Standard)	Assembly & Test
	Assembly Procedures
	Calibration
	CMM (Coordinate Measuring Machine) Training
	Control of Non-Conforming Prod (DMR Training)
	Crane Operation
	Critical Design Review
	Electrostatic Discharge
	Engineering Change Notice

Attachment 2 - Training Delivery and Curriculum Listing

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

	Epoxy Procedure
	Equipment & Facilities Maintenance
	Forklift Operation
	Hall Effect Sensor Assembly Cummins 65042-1
	Internal Quality Audit
	Inventory Control/Cycle Counts
	IPC 610 soldering training
	New Inverter Assembly Training
	OSHA 10
	OSHA 30
	PCP soldering to IPC and inspection
	Proper Torque Techniques
	Receiving and Stocking
	Repair, Test and Inspection Plan for Fuel Pumps
	Repair, Test and Inspection Plan for Oil Pumps
	Return Material Authorization (RMA)
	Shipping
	Synergy Overview
	Testing Procedures
	Use and Handling of Liquid Nitrogen

Delivery Method /Level	*E-Learning – Computer Based Training (CBT)*	
Training Type (Level)	**Planned Course Offerings**	**Standard Hours**
Business Skills	Are You Listening to Your Customers	0.25
	Creating and Sustaining a Customer-Focused Organization	0.25
	Customer Driven Improvement: Identifying Needs	1.00
	Customer Service Confrontation and Conflict	1.00
	Customer Service Fundamentals: Building Rapport	1.00
	Customer Service over the Phone	1.00
	Developing Your Customer Focus	0.25
	Essential Skills for Professional Telephone Calls	1.00
	Shaping the Direction of Customer Service in Your Organization	1.00
Computer Skills	GD&T Big Concepts	1.00
	GD&T Concentricity/Symmetry Controls	0.50
	GD&T Datum Theory	1.00
	GD&T Datums: Theory-to-Reality	3.00
	GD&T Definitions/Concepts	1.25
	GD&T Form Controls	0.50
	GD&T Form Controls (Straightness)	0.75
	GD&T General Rules	0.75
	GD&T Material Condition Modifiers	1.00

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

	GD&T Orientation Controls	1.00
	GD&T Position Tolerancing	1.00
	GD&T Profile Controls	0.75
	GD&T Review	0.50
	GD&T Runout Controls	0.50
	GD&T Virtual Condition/Feature Control Frames	1.00
	Geometric Dimensioning & Tolerancing (GD&T) Intro	1.50
Manufacturing Skills (ME) (Safety)	Compressed Gas Safety	0.50
	Electrical Safety	0.50
	Spill Prevention and Control	0.50

TRAINING PROPOSAL FOR

Quality Refrigeration Company, Inc.

17-0892

Panel Meeting Date:	01/24/2018
Regional Office:	North Hollywood Regional Office
Analyst Name:	Margarita Paccerelli
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:		$ 38,720.00	
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$ 38,720.00	N/A	$ 0.00	$ 52,500.00

APPLICANT PROFILE

Company Summary	Quality Refrigeration Company, Inc. (QRCI) specializes in marine, commercial, and industrial refrigeration and air conditioning sales and service.

Industry Sector(s)	Services (Other)		
Priority Industry	No		
No. Employees (Applicant)	**State:** 35	**US:** 35	**World Wide:** 35
Turnover Rate (Applicant)	0.00 %		
Repeat Contractor	Yes		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	To grow its business, the Company must stay current with new technologies. Employees will be trained on new products and changes with existing products. Additionally, the Company must train on its new ERP system to improve processes.

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	55	$ 1210	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1950 and headquartered in Wilmington, QRCI specializes in heating, ventilation, air conditioning and refrigeration (HVACR), marine and commercial refrigeration, equipment & parts, system design, retrofits, maintenance and repair services. Customers include the cruise ships, cargo lines, bakeries, other marine vessels, hospitals, restaurants, the military, and the government.

QRCI has two locations; the other in San Diego. Both locations will participate in ETP-funded training.

2. Current Training Project Details

Purpose of Training	This will be the second ETP Agreement for QRCI. The proposed training will be different from the prior project which focused on various operations and current maintenance requirements of refrigeration and air conditioning equipment. This proposal will focus on training employees in new equipment and processes. Some curriculum courses are repeated from the prior Agreement for newer employees who did not participate in the previous training. Training will not be duplicated.
	Training in this proposal will focus on newer types of HVAC systems currently in the market. Technicians need to learn how to fabricate, assemble, install, repair, and maintain new product lines in addition to new updates and releases from 38 existing product lines. Administrative staff will also need this training so they can correctly order parts, invoice customers, troubleshoot fixes, and provide better customer service.
	Further, QRCI is expanding into different marketplaces within the industry such as ammonia, centrifugal, and energy efficient systems, which require not only technical but also environmental compliance training. For example, energy efficiency demands are currently having a significant impact on the HVAC industry. The standards are updated periodically by the California Energy Commission to include new energy efficiency technologies and methods. Along with standards, the Company must train employees on new types of equipment and controls.
	The proposed training will also focus on the implementation of QRCI's new Enterprise Resource Planning (ERP) system, MAS 100/Sage Business Management System and support applications. Training is needed to expand and improve communication, task assignment, efficiency, and customer support.

PROPOSED TRAINING PROJECT DETAILS

Training Infrastructure and Administrative Plan	QRCI's President will oversee ETP-funded training. The Company has also retained an outside administrative consultant to ensure that all training records meet ETP compliance. Training will be delivered by in-house staff and, if necessary, vendors.
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 Class/Lab Business Skills, Commercial Skills, and Computer Skills. Technicians will also receive Hazardous Materials. Course topics are shown in detail in Attachment 2 of the proposal.	

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	Training Funding Source	Seal Beach	$ 2,900.00
Administrative	Training Funding Source	Seal Beach	Not to exceed 13.00% 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 contract(s) completed within the last five years.

Previous Contract Activity					
Agreement Number	**Location(s)**	**Term**	**Approved Amount**	**Project Earnings**	**Performance Percentage**
ET16-0297	San Diego, Wilmington	11/18/2015–11/17/2017	$47,520	$47,520	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	Coaching/Communication
	Customer relations
	Leadership
	Planning
	Sales
Commercial Skills (Standard)	Ammonia systems
	Brazing
	Centrifugal Systems
	Chillers
	Compressors
	Condensers
	Cooling Towers
	Electronic Devices and Controls
	Energy Efficient Building Management Systems Metering Devices
	Evaporators
	Fabrication/Assembly/Installation/repair procedures
	Heating Ventilation Air Conditioning Refrigeration (HVACR)
	Ice Machines
	Marine Systems
	New Product Line - Cospolich Refrigeration
	New Product Line - DRS Marlo
	OSHA 10 (requires 10 hours completion)
	Pressure testing
	Preventative Maintenance
	Refrigeration-Troubleshooting, Leaks and Recharging
	Standard Operating Procedures (SOP's)
	Thermostats
	Variable Speed Drives
	VRF(Variable Refrigerant Flow) Systems
	Walk In Refrigeration
	Water Circuitry and Treatment
	equipment operations
Computer Skills (Standard)	Financial/Accounting-MAS 200
	Microsoft Office
	Mobile Tablet
Hazardous Materials Skills	Hazmat handling

TRAINING PROPOSAL FOR

SCRAM of California, Inc.

17-0920

Panel Meeting Date:	01/24/2018
Regional Office:	San Diego Regional Office
Analyst Name:	Kellen Hernandez
Type of Proposal:	Single Employer (SB), Small Business Program
Funding Source:	Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		$ 44,550.00	
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$ 44,550.00	N/A	$ 0.00	$ 53,040.00

APPLICANT PROFILE

Company Summary	SCRAM of California, Inc. (SCRAM) uses monitoring and testing technologies developed to supervise DUI offenders for court systems and probation department customers as the offender works through rehabilitation programs.

Industry Sector(s)	Healthcare - Services
Priority Industry	No
No. Employees (Applicant)	**State:** 34 **US:** 34 **World Wide:** 34
Turnover Rate (Applicant)	2.70 %
Repeat Contractor	No
High Unemployment Area	Yes
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Training will help meet increasing customer demand, technological updates to equipment and retain staff. Training will enable SCRAM's employees to install monitoring equipment correctly, analyze data efficiently and interact positively with the DUI offender population. ETP-funded training will provide the Company with hard and soft skills necessary to increase its customer base and manage the increase in new offenders to monitor.

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

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	27	$ 22.00	45	$ 990	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	18	$ 22.00	45	$ 990	8 - 60

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 2010 and headquartered in San Diego, SCRAM specializes in monitoring DUI offenders. The Company is focused on servicing court systems and probation departments throughout California, Arizona, and Nevada. In addition, the Company works directly with attorneys, sheriffs, and other criminal justice agencies to ensure compliance with court-ordered drug & alcohol abstinence, and rehabilitation programs.

SCRAM provides comprehensive home detention and electronic monitoring services to its customer base. SCRAM staff install the monitoring equipment, monitors offender alcohol consumption, tracks their location via GPS, and reports the results to probation departments and other stakeholders. The Company utilizes the newest monitoring and testing technologies geared toward alcohol offender management and rehabilitation.

This will be SCRAM's first 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 demand for SCRAM's services has fueled the Company's growth where they have expanded from operating in a few counties to over 27 counties in three states. SCRAM's strategy to meet increased customer demand is to invest in updated Scram systems software, new/updated alcohol monitoring equipment, a CRM platform and a new human resources platform, Inferity. These investments in new software and hardware technologies and the training associated to utilize these technologies will increase production, improve efficiency and increase profitability.
	SCRAM Case Managers will participate in hard skills training focused on utilizing updates to software systems, installing new equipment, and quality assurance management. Trainees will also receive soft skills training focused on time management, communication, and conflict management in order to interact professionally with an offender population. In addition, the Program Development staff will receive a mixture of hard skill and soft skill training focused on learning to utilize the new CRM platform, sales forecasting/IMPACT sales training, customer service and project management.

PROPOSED TRAINING PROJECT DETAILS

Training Infrastructure and Administrative Plan	SCRAM has designated a Human Resources Lead and Operations Manager to administer the ETP project, manage training scheduling, enroll trainees, track training hours, and meet with ETP staff. In addition, SCRAM has hired Judith's Training Services to assist with project administration and ensure that the training is scheduled, new hirers are enrolled, training hours are tracked, and attendance rosters meet ETP compliance regulations.
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, Computer, Continuous Improvement, Hazardous Materials, Literacy and Manufacturing Skills (Attachment 2). Training will be delivered by in-house experts and vendors to be determined.	

Delivery Method/Level	E-Learning - Computer Based Training (CBT)
Summary	
All occupations will receive training in Business and Computer Skills (Attachment 2). Training will be delivered via software platform.	

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 Job Creation

The State of California's justice system realignment legislation has impacted the county jail system creating the need for counties and municipalities to monitor DUI offenders via electronic means, provide a home detention program, and offer re-entry programming to promote successful reintegration into society. This change in policy has created significant demand for SCRAM's services and is the main catalyst for their request to include a job creation component in their project.

PROPOSED TRAINING PROJECT DETAILS

The Company is growing locally and regionally by opening new locations as their customer base expands. The expansion will be both new geographical areas of business and current regional territory expansion. New Program Development/Sales staff are needed to cultivate and service the new accounts and new Case Managers are needed to manage the DUI offender population that is being monitored in the program.

4.3 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	$4,320.00
Administrative	Judiths Training Services	Los Angeles	10%
Training	None selected to date	N/A	N/A

4.4 Previous ETP Project Summary

The applicant has no previous ETP contracts.

4.5 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
	Coaching Procedures
	Conflict Management
	Customer Relations/Service
	Decision making
	Interpersonal Skills
	Inventory Control
	Leadership
	Point of Sales System
	Product Knowledge
	Sales/Impact Sales
	Strategic Planning
	Time Management
Computer Skills (Standard)	Alcohol Monitoring Services
	Cost Accounting
	Human Resources and Payroll Platform (Inferity)
	Inventory Control
	Microsoft Office Small Business Only
	Purchase Order Tracking
	Quickbooks
	Sales Forecasting/IMPACT
	World Wide Web (WWW)- SCRAM NET
Continuous Improvement Skills	Decision Making
	Drug testing procedures
	Interpreting Charts and graphs
	Leadership Skills for Frontline Workers
	Methods to monitor quality control
	Problem Solving
	Process Improvement
	Quality Assurance Management
	Statistical Analysis
	Strategic Planning, Evaluations, Monitoring
	Team Building
Hazardous Materials Skills	Hazardous chemical cleaning/handling
	Hazardous waste handling
Literacy Skills	Basic Math
Manufacturing Skills (ME) (Standard)	Cross Training in production equipment/skills

Delivery Method /Level	E-Learning – Computer Based Training (CBT)

Attachment 2 - Training Delivery and Curriculum Listing

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

Training Type (Level)	Planned Course Offerings	Standard Hours
Business Skills	AMS Alchol Monitoring Services	1.00
	How to Deliver Grand Slam Customer Service	1.00
	Top 10 Survival Skills for First Time Supervisors	1.00
Computer Skills	Advanced Microsoft Excel	2.00
	Advanced Microsoft Power Point	2.00

TRAINING PROPOSAL FOR

Springer Collision Centers dba Fix Auto
17-0741

Panel Meeting Date: 01/24/2018

Regional Office: San Francisco Bay Area Regional Office

Analyst Name: Robert Jackson

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:		$ 49,764.00	
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$ 49,764.00	N/A	$ 0.00	$ 75,500.00

APPLICANT PROFILE

Company Summary	Springer Collision Centers dba Fix Auto (Springer) (www.fixauto.com) provides collision repair services and sells auto parts.

Industry Sector(s)	Services (Other)		
Priority Industry	No		
No. Employees (Applicant)	**State:** 50	**US:** 50	**World Wide:** 50
Turnover Rate (Applicant)	10.25 %		
Repeat Contractor	Yes		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Training will focus on upgrading skills of recent auto-repair graduates and new scanner and software equipment recently purchased.

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	$ 22.00	41	$ 902	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	24	$ 22.00	43	$ 946	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in1987 and headquartered in San Jose, Springer is an automotive collision repair facilty that services consumers, insurance companies and fleet accounts, repairing automobiles with associated mechanical and sublet repairs. Springer has three locations: San Jose, Santa Clara, and Gilroy. This will be Springer's second proposal for funding, and the second in the last five years.

2. Current Training Project Details

Purpose of Training	Springer is offering training to address skill deficits in technical skill requirements dictated by evolving equipment and materials used in the field. Changes stem from vehicle manufacturing methodologies to meet CAFE (corporate average fuel economy) Federal standards as well as computer and safety enhancements. These include aluminum repair, alternative fuel and electric/hybrid vehicles, advanced vehicle systems, and advanced materials repair and replacement. The Company has also invested in new computer-based scanners used to scan pre- and post-collision fault codes essential for repairing vehicles manufactured after 2013. Additionally, the auto repair industry is facing an increasing dilemma: currently, technician are getting older (the average age of technicians is 49) and customer services is growing at more than 9% annually in recent years. Succession planning needs to be at the forefront of the Company's training plans to make sure skills, such as repair processes, problem-solving, customer service, and quality systems, can be passed on to new employees.
Training Infrastructure and Administrative Plan	Springer will utilize the same staff from the previous successful contract. Springer also retained Synergy Consulting to assist with contract administration and development. Training will be delivered by in-house subject-matter experts and, if necessary, training vendors. ETP-funded training will not offset Springer's existing commitment to training. Springer currently commits estimated $46K to the San Jose site, $15K to Gilroy, and $35K Santa Clara annually. Courses regularly provided include; basic shop policy and procedures, company values, sexual harassment prevention and hostile work environment.
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	
Administrative Staff, Estimators, Production Staff, Supervisors, and Technicians will receive training on courses listed in Attachment 2.	

Delivery Method/Level	Productive Laboratory
Summary	
Technicians and Estimators will receive Productive Lab training (not to exceed 24 hours maximum per trainee in PL) on courses listed in Attachment 2.	

4. Additional Company or Training Project Details

Retrainee – Job Creation

Springer is opening a new facility in Santa Clara and will be hiring 24 new employees. 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	Synergy Managment Consultants, LLC	Grass Valley	$3,000
Administrative	Synergy Managment Consultants, LLC	Grass Valley	Not to exceed 13.00% of payment earned
Training	PPG Industries-Commercial Skills	Fairfield	$1,200
	Toyota-Commercial Skills	Long Beach	$7,000
	Finishmaster-Commercial Skills	San Jose	$2,500
	ICAR-Commercial Skills	Los Angeles	$8,500

PROPOSED TRAINING PROJECT DETAILS

4.3 Previous ETP Project Summary

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

Previous Contract Activity					
Agreement Number	**Location(s)**	**Term**	**Approved Amount**	**Project Earnings**	**Performance Percentage**
ET15-0334	Gilroy, San Jose	11/19/2014-11/18/2015	$28,160	$27,478	98%

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	Conflict Resolution
	Customer Care Skills
	Customer Engagement
	Direct Repair Partner Management
	Educating the Consumer
	Overcoming Objections
	Presentation Skills
	Sales procedures and Strategies
	Understanding Financial and Operating Metrics
Commercial Skills (Safety)	Emergency Clean up Procedures
	Handling chemicals and clean up procedures
	Managing MSDS sheets
Commercial Skills (Standard)	3 Stage refinishing process
	3D measuring systems
	Active lane keeping systems
	Adhesive bonding
	Adv Materials and composite repair
	Aluminum bonding and structual repair
	Aluminum Tools and minor repair
	Collision Repair Skills
	Color sand/ polish/ de-nib surfaces
	Color Theory and matching principles
	Esitmating mechanical and electrical systems
	Estimating hybrid and electrical vehicles
	Estimating steering and suspension damage
	Hybrid and electric vehicle repair
	Hybrid vehicle battery/ charging systems
	ICAR Collision Repair/ Refinish Skills
	Mig/TIG/ Resisistance spot welding
	OEM Cert Toyota, Honda, VW, BMW, GM, Ford
	Pillars, rockers, floors, rail replacement
	Plastic and composite repair
	product knowledge
	R1234yf AC systems
	Refinish Skills
	Spray gun set up and maintenance
	Steering, suspension and mechanical systems
	Structual repair/ unibody alignment
	Surface preparation

Attachment 2 - Training Delivery and Curriculum Listing
Provided below are details on the types of training planned for this proposed Training Project.

	Vehicle Priming and Sealing
Computer Skills (Standard)	All Data application
	Car-O-Liner Measuring software
	CCC1 Software
	Fix Auto Software applications
	Mitchell Estimating
	MS Office Intermediate/ Advanced
	OEM Repair Process Retrieval
	Parts Trader- Parts Procurement software
	Quickbooks
	Repair Scanning Software
	Tesla Estimating/ parts software
	VOC Tracking
Continuous Improvement Skills	Best Practices Implementation
	Just-in-time Inventory control/ protocol
	Lean Process and Integration
	Problem Solving and decision making skills
	Quality Assurance
	Root Cause Analysis
	Team Building
Management Skills	Coaching Skills for supervisors
	Collaborative Leadership
	Creating Business Strategy
	Motivating Employees
	Understandig Finance and operational Metrics

Delivery Method /Level	Productive Laboratory
Training Type (Level)	**Planned Course Offerings**
Commercial Skills	3 Stage color match PL
	3D measuring set up/ analysis PL
	Aluminum Bonding PPL
	Aluminum Repair PL
	Aluminum Welding PL
	Body Filler Methods PL
	Color Blending PL
	Color Tinting PL
	Esimating advanced vehicle systems PL
	Esimating Diagnosis PL
	Estimating Adv materials composite struct PL
	Estimating DRP procedures new tech PL
	Mig Brazing PL

	Rivet Bonding PL
	Scanning analysis PL
	Structural corrections with 3D measuring PL
	Structural Welding PL

PL Justification and Details			
Explain the need for productive laboratory (PL) training	Productive lab is needed for technicians and estimators coming into the industry that lack experience. Even those who attend vocational schools are being found by Springer to be in need of additional training. Commercial skill topics only will be delivered via PL method.		
Describe the Equipment/Processes to be used in delivering the PL training	Equipment to be used will be resistance spot welders, mig (metal inert gas) welders, frame rack and measuring system, spray guns, spray booths, various hand tools, All-data IT, estimatics and ADP system for estimators including Mitchell, CCC and ADP estimating systems and CCC1 Software. Training assignments will be in one of two overarching disciplines: Collision Repair and painting including body plastic repair, welding of structural parts, measuring frames and aluminum repair.		
Describe Trainer Qualifications	The trainer role is to explain process/ tools/ expectations and standards as well as coach techniques, mentor and support the student to ensure proficiency. Journey level and expert trainers including vendors and lead employees will deliver the PL topics.		
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

Telaeris, Inc.

18-0606

Panel Meeting Date:	01/24/2018
Delegation Order Date:	12/28/2017
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:		$ 10,400.00	
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$ 10,400.00	N/A	$ 0.00	$ 10,000.00

APPLICANT PROFILE

Company Summary	Telaeris, Inc. (Telaeris) provides IT products and solutions for Radio Frequency Identification technologies to companies worldwide.

Industry Sector(s)	Professional, Scientific, and Technical		
Priority Industry	Yes		
No. Employees (Applicant)	**State:** 8	**US:** 8	**World Wide:** 8
Turnover Rate (Applicant)	15.38 %		
Repeat Contractor	No		
High Unemployment Area	No		

Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Training under this proposal will focus on changing radio frequency identification (RFID) software programming, equipment hardware, and other technologies.

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	40	$ 1040	8 - 60
1	Retrainee	7	$ 26.00	40	$ 1040	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	2	$ 26.00	40	$ 1040	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 2005 and located in San Diego, Telaeris creates commercial off-the-shelf hardware and software products for RFID technologies. The Company provides mobile tracking solutions to help businesses manage physical security, safety, inventory and equipment. Customers include small and large manufacturing, industrial and the government including Disney, Tesla, Tesoro, the Social Security Administration, the National Institute of Health, and the White House Communications office.

2. Current Training Project Details

Purpose of Training	Telaeris has international and domestic competitors. To remain competitive, the Company must train staff on processes and people skills to make the Company more efficient. Training will focus on inventory management and visitor management software systems to ensure that staff is knowledgeable on current technological changes to these systems. The Company must also train on customer service. Customer service, sales, and product knowledge will allow employees to better help customers. The Company has grown 30% in the past two years, with growth expected to continue for the next two years. To keep up with growth and stay current in new technologies, Telaeris will focus on 4 major areas of training: RFID Technologies; Software Updates; Hardware Product Knowledge; and Sales Skills. The Company is planning to expand into Central California by opening an office in Visalia in mid to late 2018. Currently one staff member works remotely in the area and has been able to increase sales in the farming and agricultural industries. The planned expansion will allow the Company to target more potential clients in Northern California. Training will be provided by both in-house subject-matter experts and vendors. The Company currently provides training for staff but will utilize the ETP project as way to formalize training and provide more training than before.
Training Infrastructure and Administrative Plan	The ETP project will be administered by the CEO/Owner with assistance from a marketing staff member. They will oversee the training schedule, collect training rosters after each training session, and upload training to the ETP Online System.
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 will be provided in Business Skills, Commercial Skills and Manufacturing Skills to occupations identified in Attachment 1.	

4. Additional Company or Training Project Details

Retrainee - Job Creation

Due to 30% Company growth and future anticipated growth, Telaeris has committed to hiring two new employees (one new Sales Staff and one Engineer). The date-of-hire 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

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	CRM training
	Leadership Skills
	Quickbooks training
	Sales Skills
	Serving Government Clients
Commercial Skills (Standard)	Adobe Acrobat Software
	CAM/CAM Software
	Circuit Analysis
	Coding Software
	Database Software Skills
	Mobile Development Technology
	Physical Access Control Systems
	Programming Software
Computer Skills (Standard)	Radio Frequency Identification Technology
	RFID Equipment
	RFID Software & System Capabilities
Manufacturing Skills (ME) (Standard)	Diagnostic Equipment training
	Handheld Eqpt - Assembly, disassembly, software
	Soldering

TRAINING PROPOSAL FOR

The Warden's Office, Inc.

17-0590

Panel Meeting Date:	1/24/18
Regional Office:	Sacramento Regional Office
Analyst Name:	Jana Lazarewicz
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:		$ 23,408.00	
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$ 23,408.00	N/A	$ 0.00	$ 20,000.00

APPLICANT PROFILE

Company Summary	The Warden's Office, Inc. (Warden's Office) is an office furniture and office supply retailer. The Company also provides office planning and design, moving, and set-up services.

Industry Sector(s)	Retail		
Priority Industry	No		
No. Employees (Applicant)	**State:** 32	**US:** 32	**World Wide:** 32
Turnover Rate (Applicant)	5.00 %		
Repeat Contractor	Yes		

High Unemployment Area	Yes
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Warden's Office is continuously seeking to upgrade the skills of its workforce to keep pace with an ever evolving and competitive industry. Training will focus on increasing employee product knowledge, enhancing technical skills, and improving company operational procedures.

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	28	$ 616	8 - 60
1	Retrainee	37	$ 22.00	28	$ 616	8 - 60

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 1965 and headquartered in Modesto, Warden's Office is a brick and mortar and online office furniture and supply retailer. The Company also provides office planning and design, moving, and furniture set-up services to businesses throughout California's Central Valley. Warden's Office primarily serves enterprises in healthcare, agriculture, manufacturing, finance, and logistics industries. The Company has two facilities in Modesto, both of which will participate in training.

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 Warden's Office's fifth ETP Agreement and the fourth in the last five years. In this proposal, Warden's Office will continue to build on its previous trainings of improving efficiency through paperless workflow and process improvements. The Company will also provide training on new products, sales, and business management. There will be no duplication of training for trainees who participated in the prior contract. Warden's Office faces competition from online retailers and "big-box" stores, such as Staples and Office Depot. For Warden's Office to remain competitive, it must improve processes. To achieve this, the Company invested in quarterly updating of their Enterprise Resource Planning system, ECi DDMS, to enhance business functions. Training is necessary to give employees the tools necessary to navigate the system and improve operations. Furthermore, the Company's training plan will focus on new product marketing and customer service. Courses such as Product Knowledge, Sales Techniques, and Improving Customer Contact will provide trainees the skills and knowledge needed to ensure clients have a positive experience.
Training Infrastructure and Administrative Plan	Warden's Office has designated their Finance and Administration Manager to plan and oversee all aspects of training. This is the same individual who successfully oversaw the administration of their prior agreements. The Company already has a process in place to ensure all administrative duties are handled properly and all managers are aware of their responsibilities.
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	
All occupations (Attachment 1) will receive training in Business, Commercial, Continuous Improvement, and Computer Skills topics (Attachment 2).	

Delivery Method/Level	**E-Learning - Computer Based Training**
Summary	
Trainees will receive Computer-based Training (CBT) in Computer and Commercial Skills (Attachment 2). CBT shall not exceed 50% of each trainee's total training.	

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**
ET15-0292	Modesto	09/01/2014 – 08/30/2016	$22,968	$22,968	100%

PROPOSED TRAINING PROJECT DETAILS

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
ET13-0424	Modesto	06/24/2013 – 06/23/2014	$30,492	$24,541	80%
ET12-0440	Modesto	06/26/2012 – 06/25/2013	$23,100	$23,100	100%

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	Account Development Procedures
	Business Analysis
	Communication Skills (Verbal & Written)
	Customer / Vendor Relations
	Getting Business Results
	Improving Customer Contact
	Product Knowledge
	Sales Techniques
Commercial Skills (Safety)	Driving Safety
	Forklift Safety
	Lifting
Commercial Skills (Standard)	Loading/Unloading
Computer Skills (Standard)	ECi DDMS
	Microsoft Office Products (Intermediate/Advanced)
Continuous Improvement Skills	Effective Planning
	Efficient Workflow
	Operation and Systems Analysis
	Order, Picking and Packing
	Problem Solving Tools and Techniques
	Process Development
	Quality Control
	Root Cause Analysis
	Sequencing Procedures

Delivery Method /Level	E-Learning – Computer Based Training (CBT)	
Training Type (Level)	**Planned Course Offerings**	**Standard Hours**
Commercial Skills (Safety)	Driving Safety	2.00
	Forklift Safety	1.00
	Lifting	1.00
Commercial Skills (Standard)	Loading/Unloading	1.00
Computer Skills	ECi DDMS	8.00

TRAINING PROPOSAL FOR

Tuo Sogno Inc.

17-0973

Panel Meeting Date:	01/24/2018
Delegation Order Date:	12/01/2017
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: $49,608.00			
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$49,608.00	N/A	$0.00	$125,000.00

APPLICANT PROFILE

Company Summary	Tuo Sogno, Inc. dba European Wholesale Countertops (EWC) (www.europeancompany.com) manufactures, fabricates, and installs marble, quartz surfaces, soapstone, limestone, travertine, exotic stone, semi-precious and granite countertops.

Industry Sector(s)	Manufacturing
Priority Industry	Yes
No. Employees (Applicant)	**State:** 90 **US:** 90 **World Wide:** 90
Turnover Rate (Applicant)	0.00 %
Repeat Contractor	No
High Unemployment Area	No
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Training will improve product and service knowledge and improve skills of its entire workforce to successfully support increased 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	Owner, Retrainee	90	$26.00	18	$468	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	8	$26.00	36	$936	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1986 and located in Santee, EWC is a fourth generation family-owned small business that provides custom stone design and fabrication of countertops, flooring, and vanities. The 40,000 square-foot fabrication facility houses computer-assisted design stone cutting, shaping, and polishing tools and machineries which allows EWC to complete the entire production process in-house; from the initial design, removal of old countertops, slab selections, templating, cutting, edge details, delivery and final installation. Customers include Home Depot, commercial and residential building owners, and general contractors.

This will be EWC's first ETP Contract.

2. Current Training Project Details

Purpose of Training	EWC's largest customer, Home Depot, is offering the Company an opportunity to increase customers purchasing its stone products. This will result in a projected 25% increase in sales revenue for EWC. In addition, EWC's custom/high-end retail customers are requiring the Company to add new deliverables such as stone pattern matching as well as provide higher level of product and service quality.
	To successfully support its projected business growth and meet customer needs, EWC has committed to implement a comprehensive training initiative focused on improving internal product and service knowledge. In addition, EWC initiative will focus on implementing new technology systems and processes to meet the diversity of customer demands.
	Specifically, the training is geared towards keeping its entire workforce updated with the current trends in stone fabricating, cutting, and installing construction materials. Further, EWC plans to provide upgrade training for its Production Staff to improve skills on how to set-up, operate, maintain new and existing shop machines. Training will provide workers with skills necessary to increase efficiency and productivity to maintain the Company's ability to return profitable margins.
	As part of its technology implementation, EWC acquired $900K of upgraded software systems and new equipment photo cameras, Fabricators Choice. In September 2017, the Company installed a new Enterprise Resource Planning System, Epicor Program. It also plans to implement Adobe Illustrator, Adobe Premier Pro, Microsoft Teams, and Project Microsoft Office software system upgrades. An extensive computer software training plan will enable office, shop, and field workers to better utilize technology to reduce human errors and paperwork in order to streamline technological processes. Training will also allow Production and

	Administrative staff to bill customers accurately, which will result in accurate profit forecasting and reduce product and labor-carrying costs.
Training Infrastructure and Administrative Plan	EWC has obtained Training Funding Source to assist with ETP project administration. In addition, the Company has designated its Human Resources (HR) staff and Department Leads to schedule and deliver ETP training. The HR team will collect completed attendance rosters, submit to the administrative subcontractor. The Company owner will oversee all administration and management of the ETP project. The Owner, HR Staff, and the administrative subcontractor will meet with ETP staff during monitoring meetings. 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 in Business, Computer, Continuous Improvement, Hazardous Materials and Manufacturing Skills will be provided to all occupations.	

Delivery Method/Level	Productive Laboratory
Summary	
Productive Lab training in Manufacturing Skills will be provided to approximately 48 Production Staff.	

4. Additional Company or Training Project Details

Retrainee – Job Creation

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

PROPOSED TRAINING PROJECT DETAILS

To support growth and business needs, EWC has committed to hire approximately 16 new employees (Customer Service, Administrative and Production Staff). Given the large number of projected newly-hired workers under ETP requirements, eight are planned under this proposal (as shown in Group 2). The date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

EWC 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	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 itraining, 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	Budget
	Change Management
	Coaching/Collaboration/Communication
	Conflict Management
	Customer Satisfaction
	Leadership
	Planning
	Product/Service Knowledge
	Risk Management
	Sales
	Time Management
Computer Skills (Standard)	Adobe Illustrator, Photoshop
	BisTrack/Epicor
	Microsoft Office, teams, Power BI, Project
	SalesForce CRM
	Sharepoint
	Human Resources System
	Payroll System
	Website Application Skills
Continuous Improvement Skills	Process/Performance/Productivity improvement
	Quality Systems and Procedures
	Team Building/ Problem Solving/ Decision-Making
Hazardous Materials Skills	Flammable Liquids/Gases
	Hazard Communication (HazCom)
	Toxic and Infectious Substances
Manufacturing Skills (ME) (Standard)	Material Sourcing/Handling and Storage
	Equipment Operation, Maintenance, Troubleshoot
	Job Cost
	Power Tool Use
	Quality Control
	Shop/Field Operational Procedures
	Site Logistics
	Stone Cut/Fabrication/Installation Procedures
	Storm Water Pollution Prevention Program
	OSHA 10

Delivery Method /Level	Productive Laboratory
Training Type (Level)	**Planned Course Offerings**
Manufacturing Skills (ME) (Standard)	Equipment Operation, Maintenance, Troubleshoot
	Shop/Field Operational Procedures

Attachment 2 - Training Delivery and Curriculum Listing

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

	Stone Cut/Fabrication/Installation Procedures
PL Justification and Details	
Explain the need for productive laboratory (PL) training	Productive Laboratory Training (PLT) of up to 24 hours is needed 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/fabrication processes. The PL training will be especially useful for the job creation trainees hired during the term of the contract. PL training will allow the newly hired trainees have the skills needed to perform at a high level in a productive environment in order to reduce errors. Further, training to customer specifications on expensive slabs that could result in scrap would be cost prohibitive.
Describe the Equipment/Processes to be used in delivering the PL training	Training will occur on production equipment (CNC, etc) to cut and fabricate stone in shop and customer location. Trainees will learn how to learn how to manufacture and fabricate to customer specifications from diagrams.
Describe Trainer Qualifications	Training will be provided by the Production Managers and most senior and proficient lead Production fabricators and installers with extensive experience in their trade.

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

W. Banks Moore, Inc.

18-0568

Panel Meeting Date:	01/24/2018
Regional Office:	Sacramento Regional Office
Analyst Name:	Dumaurier Jordan
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:		$ 39,000.00	
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$ 39,000.00	N/A	$ 0.00	$ 45,000.00

APPLICANT PROFILE

Company Summary	W. Banks Moore, Inc. dba Banks & Co. (Banks & Co.) (www.banks-co.com) distributes, installs, and repairs fuel-dispensing systems and automated car wash systems throughout the Central Valley.

Industry Sector(s)	Construction
Priority Industry	Yes
No. Employees (Applicant)	**State:** 36 **US:** 36 **World Wide:** 36
Turnover Rate (Applicant)	15.00 %
Repeat Contractor	Yes
High Unemployment Area	Yes
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Training will focus on new Radio Frequency Identification (RFID) Chip Technology. Staff will also be trained on 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	Owner, Retrainee	2	$ 26.00	35	$ 910	8 - 60
1	Retrainee	34	$ 26.00	35	$ 910	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	4	$ 26.00	60	$ 1560	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Banks & Co. installs, sells and services Gas Dispensing Pumps, tanks, and Point of Sale systems for Gas Stations, Convenience Stores, and Truck Stops. The Company also installs, repairs, and maintains automatic car wash systems and tests gas pumps to ensure the vapor recovery system is operating properly. The Company has one location in Fresno.

2. Current Training Project Details

Purpose of Training	This is the Company's fourth ETP Contract and the fourth in the last five years. The previous contract focused on the Company's Lean manufacturing training plan and had included point-of-sale (POS) systems. However, the POS systems training was postponed and will be delivered under this proposal. This proposal will also include training on other updated equipment. The new credit card industry standard requires all point-of-sale (POS) systems to read cards with Radio Frequency Identification chips. This training was originally projected to take place during the prior Agreement; however, mandatory compliance for vendors using the POS systems was postponed until 2019 and thus, trainnig was also postponed. Technicians will learn to install, maintain and repair these new POS systems. In addition, Banks & Co. will train technicians on new versions of Fuel Dispensing/Vapor Recovery equipment and Leak Detection systems that have recently required updates. Training will focus on sales: account development, upselling, and customer service. Training will assist in fostering growth.
Training Infrastructure and Administrative Plan	Banks 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. Training will be delivered by in-house subject-matter experts and vendors, if necessary.
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, Commercial, Computer, Continuous Improvement, and Hazardous Materials topics listed under Attachment 2.	

Delivery Method/Level	Productive Laboratory
Summary	
Service Technicians, Construction Crew members, and Managers will receive training applicable to their jobs in Productive Lab (PL) Commercial Skills as listed under Attachment 2. Banks & Co. is requesting a ratio of 1:2 for PL training as trainees work in groups of two employees when working on the job site. PL is capped at a maximum of 15 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

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	Strategic Business Solutions, LLC	Visalia	$2,730
Administrative	Strategic Business Solutions, LLC	Visalia	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 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**
ET16-0236	Fresno	10/08/15 – 10/07/17	$49,400	$49,400	100%
Notes	The contractor has uploaded a sufficient number of training hours and is projected to earn 100% of the Agreement amount. The Agreement is pending fiscal closeout.				
ET15-0241	Fresno	07/25/14 – 07/24/16	$37,440	$37,440	100%
ET13-0415	Fresno	06/24/13 – 06/23/14	$23,232	$19,425	84%

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	Account Development Training Phase 2
	Project Management
Commercial Skills (Standard)	Bravo Systems Containment Pumps Installation repai
	GilBarco Systems Installation and repair
	Mark 7 Automated car Wash Systems Installation and
	Veeder Root Systems Installation and Repair
	VMI Leak Detection Systems Installation Operation
Computer Skills (Standard)	Point of Service Systems RFID Software Upgrades
Continuous Improvement Skills	Confined Space
Hazardous Materials Skills	Hazardous Spill Abatement

Delivery Method /Level	Productive Laboratory		
Training Type (Level)	**Planned Course Offerings**		
Commercial Skills	Fuel Dispensing Systems Installation and Repair		
	Mark 7 Automated Car Wash Installation and Repair		
PL Justification and Details			
Explain the need for productive laboratory (PL) training	The fuel Dispensing systems and the mark 7 automated car wash systems both a large systems and extremely expensive system that do not lend themselves to "mock" class/lab set up. The systems must be trained real time at the places of business so that the installations and repair skills can be tested real time through operation of the complete system.		
Describe the Equipment/Processes to be used in delivering the PL training	Fuels dispensing systems from Tank through containment sumps to the actual gasoline dispenser and vapor recovery system. The processes are set up/ troubleshooting/ operation/ testing.		
Describe Trainer Qualifications	trainers will be vendor certified as proficient in the set up , installation, troubleshooting, and testing of all systems.		
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

Wilson Ivanova Certified Public Accountants, Inc.,
A Professional Accountancy Corporation
17-0949

Panel Meeting Date:	01/24/2018
Regional Office:	North Hollywood Regional Office
Analyst Name:	Stephen Reeves
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:		$ 9,108.00	
Program & Admin Cost	**Support Cost ($)**	**Substantial Contribution ($)**	**Total In-Kind**
$ 9,108.00	N/A	$ 0.00	$ 15,214.50

APPLICANT PROFILE

Company Summary	Wilson Ivanova Certified Public Accountants, Inc. A Professional Accountancy Corporation (Wilson Ivanova) is a full-service accounting firm located in San Bernardino.

Industry Sector(s)	Professional, Scientific, and Technical		
Priority Industry	No		
No. Employees (Applicant)	**State:** 15	**US:** 15	**World Wide:** 15
Turnover Rate (Applicant)	1.00 %		
Repeat Contractor	No		
High Unemployment Area	Yes		

Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	The proposed training is intended to help employees be well-versed in the latest accounting rules, tax issues, and business advisory practices.

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	7	$ 22.00	46	$ 1012	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	2	$ 22.00	46	$ 1012	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 2014 and headquartered in San Bernardino, Wilson Ivanova offers products and serivces in the following areas: Assurance & Advisory; Part-Time CFO Services; Cash Flow Management; Succession Planning; Small Business Accounting; Internal Controls; Tax Preparation; and Tax Planning. Wilson Ivanova provides high quality services to clients in manufacturing, construction, logistics, and distribution industries. This will be the Company's first ETP contract.

2. Current Training Project Details

Purpose of Training	As a growing small business, Wilson Ivanova must ensure that its staff is up-to-date on current laws, regulations, and requirements involving tax, audit, and business management services to stay competitive. The Company has identified three key areas for employee development and business improvement: • Improve tax planning strategies to help clients increase profits. • Successfully navigate through constantly changing financial regulations to helping clients remain in good standing. • Refine customer service, presentation, and marketing skills on the Business Advisory Services side. Training will take place at the Company's location in San Bernardino. Instruction will be provided by in-house subject matter experts, including management staff. The Company may also utilize outside training vendors, when necessary.
Training Infrastructure and Administrative Plan	Wilson Ivanova has a current training budget of approximately $15,000. The Company has identified lead office personnel to oversee project administration including enrolling trainees, scheduling training, and tracking training hours. Wilson Ivanova has also retained an administrative consultant to ensure that training and documentation meet 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

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 Business Skills, Commercial Skills, and Computer Skills 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.

The Company has committed to hiring two new Accountants (Group 2) to facilitate the Company's plan to expand its existing business capacity to support a growing customer base.

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	$ 910.80
Administrative	Corporate Tax Incentives LLC	Rancho Cordova	Not to exceed 13.00% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Training Proposal for Wilson Ivanova Certified Public Accountants, Inc., A Professional Accountancy Corporation
Reference Number: 17-0949

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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.

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	**Planned Course Offerings**
Business Skills	Client Management Skills
	Communication Skills
	Conflict Resolution
	Critical Thinking Skills
	Marketing Skills
	Networking Skills
	Project Management
	Strategic Planning
Commercial Skills (Standard)	Accounting and Auditing
	Construction Tax Update
	Financial Statement Preparation
	Internal Revenue Code Updates
	Payroll & 1099 Procedures
	Penalty Abatement Basics & Techniques
	Regulatory Review
	Tax Compliance
	Tax Regulations
Computer Skills (Standard)	Microsoft Office
	QuickBooks
	Web Portal