

PANEL PACKET

JUNE 2017





NOTICE / AGENDA

MEETING TIME/PLACE

Friday, June 23, 2017 at 9:30 a.m.
California Environmental Protection Agency, 1001 I Street
Sierra Hearing Room, Second Floor
Sacramento, CA 95814
Phone: (916) 327-5640

AGENDA

- | | | |
|------------|--|--|
| 9:30 a.m. | Call to Order by Chair <ul style="list-style-type: none">• Roll Call• Agenda• Minutes | Barry Broad |
| 9:45 a.m. | Report of the Executive Director <ul style="list-style-type: none">• Legislative/Budget/Other• Request Motion to Delegate in Event of Loss of Quorum/Action• Request Motion to Adopt Consent Calendar Projects/Action• Report and Action on Cannabis Industry in CA | Stewart Knox |
| 10:00 a.m. | Report of General Counsel <ul style="list-style-type: none">• Update and Action on "Voluntarily Paid" Health Benefits | Maureen Reilly |
| 10:15 a.m. | Review and Action on Proposals | Diana Torres
Anna Nastari
Mark Mazzone |
| 11:45 a.m. | Update on Potential Program Revisions | Lis Testa |
| 12:00 p.m. | Public Comments | |
| 12:15 p.m. | Public Meeting Adjourns | |

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

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 Other changes may also occur (e.g. withdrawn).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

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

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

REVIEW AND ACTION ON PROPOSALS

These funding proposals are listed by Regional Offices and do not reflect the actual order of presentation. They will be considered by the Panel in accordance with a Table of Contents to be published on the ETP website no later than Monday, June 19, 2017 although the Panel may still change the order at the meeting.

North Hollywood Regional Office

Apprentice & Journeymen Training Trust Fund of the Southern California Plumbing & Piping Industry-----	\$949,221
Armstrong Garden Centers Inc. (Amendment)-----	\$19,440
Bakersfield Pipe and Supply, Inc. -----	\$166,140
Bernard Bros Inc-----	\$127,224
Chaffey Community College District-----	\$949,434
Cornerstone OnDemand, Inc. -----	\$384,596
Decore-Ative Specialties, Inc. -----	\$309,300
Grandcare Health Services LLC-----	\$226,102
Kinecta Federal Credit Union-----	\$219,240
LZB Manufacturing Inc. dba LA-Z-Boy-----	\$109,548
Performance Foodservice – Southern California, a Division of Performance Food Group, Inc. (Amendment)-----	\$117,060
Procore Technologies, Inc.-----	\$899,728
Riviera, Inc. dba The Enterprise U -----	\$849,000
Shaw Diversified Services, Inc. -----	\$188,190
Smart & Final Stores, Inc. -----	\$380,160
Southern California Sheet Metal Joint Apprenticeship and Training Committee-----	\$949,690
Tech Serve Alliance, So Cal Chapter, Inc. -----	\$949,712
The SYGMA Network, Inc. (Amendment) -----	\$36,720
Ultra Pro International LLC-----	\$123,600
Virgin Galactic, LLC (Amendment)-----	\$99,050

San Diego Regional Office

Goforth & Marti dba GM Business Interiors-----	\$324,000
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San Francisco Bay Area Regional Office

BioMarin Pharmaceutical Inc. -----	\$899,380
Carpenters Training Committee for Northern California -----	\$949,327
Emerald Packaging, Inc. -----	\$138,312
McWane, Inc. -----	\$194,326
Rudolph and Sletten, Inc. -----	\$196,344
The Corporation for Manufacturing Excellence dba MANEX -----	\$949,160
U.S. Foodservice, Inc. -----	\$255,150
UCFW NorCal Meat Apprenticeship Trust Fund -----	\$126,126

Sacramento Regional Office

7173 North Sharon Avenue Operating Company, LLC dba San Joaquin Rehabilitation Hospital -----	\$303,750
Amy's Kitchen, Inc. -----	\$514,080
Blue Mountain Construction Services, Inc. -----	\$249,778
Caber Enterprises, Inc. -----	\$559,268
California Manufacturers and Technology Association -----	\$949,985
Fuel Delivery Services, Inc. -----	\$247,680
J.J.R. Enterprises, Inc. dba Caltronics Business Systems -----	\$304,425
Johns Manville -----	\$429,044
Manor Care of Citrus Heights CA, LLC dba ManorCare Health Services -----	\$599,544
Rich Products Corporation -----	\$177,390
Tulare Joint Union High School District dba Tulare Adult School -----	\$182,894
Villara Corporation -----	\$343,500

PROPOSALS APPROVED
BY DELEGATION ORDER FOR 5/15/17 – 06/09/17

≤ \$100,000	Approved Date	Approved Amount
<u>North Hollywood Regional Office</u>		
Alyn Industries, Inc. dba Electronic Source Company	05/15/17	\$30,420
Birdi & Associates Inc.	05/18/17	\$44,590
Brickley Construction Company Inc. dba Brickley Environmental (Amendment)	06/07/17	\$34,944
Compass Health, Inc.	06/02/17	\$56,250
Dauntless Industries, Inc. dba Dauntless Molds (Amendment)	06/01/17	\$47,840
Norman, Fox & Co.	05/24/17	\$24,992
The Wonderful Company LLC	05/15/17	\$99,960
<u>San Diego Regional Office</u>		
Bassenian Lagoni	06/01/17	\$99,840
Dean Hesketh Company, Inc.	05/18/17	\$15,912
Hologic, Inc.	06/07/17	\$82,080
International Rubber Products, Inc.	05/23/17	\$65,728
JBZ, Inc. dba JZMK Partners	06/12/17	\$28,704
Murphy, Murphy, & Murphy, Inc.	05/19/17	\$59,400
Partners in Control, Inc.	05/24/17	\$56,056
Q C M Inc. dba Veris Manufacturing (Amendment)	05/15/17	\$37,700
Southwest Boulder & Stone, Inc.	05/04/17	\$93,600
<u>San Francisco Bay Area Regional Office</u>		
Aleia Corp. dba Surplus Service	06/02/17	\$6,552
EMSolutions	05/24/17	\$19,890
<u>Sacramento Regional Office</u>		
ARO Pistachios, Inc.	06/07/17	\$35,100
Kleen Kanteen, Inc.	05/18/17	\$50,284
The Brownie Baker, Inc.	05/19/17	\$83,980
Unison Hardware, Inc.	05/18/17	\$22,880



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Partners in Control, Inc.
QCM Inc. dba Veris Manufacturing (Amendment)
Southwest Boulder & Stone, Inc.
The Brownie Baker, Inc.
The Wonderful Company LLC
Unison Hardware, Inc.



M e m o r a n d u m

To: Panel Members

Date June 23, 2017

From: Stewart Knox
Executive Director

File: Panel Memo Doc.

Subject: **Directions to Meeting Site**

The Employment Training Panel will meet on FRIDAY, **June 23, 2017 at 9:30 a.m.**

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

Directions to the California Environmental Protection Agency - Sierra Hearing Room

From Sacramento International Airport:

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

From San Francisco

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



M e m o r a n d u m

To: Panel Members

Date June 23, 2017

From: Stewart Knox
Executive Director

File: Mtg. Site Memo

Subject: **Future Meeting Sites**

June 23, 2017	California Environmental Protection Agency Time: 09:30 AM Sierra Hearing Room, 2nd Floor 1001 I Street Sacramento, CA 95814
July 28, 2017	California Environmental Protection Agency Time: 09:30 AM Sierra Hearing Room, 2nd Floor 1001 I Street Sacramento, CA 95814
August 25, 2017	California Environmental Protection Agency Time: 09:30 AM Sierra Hearing Room, 2nd Floor 1001 I Street Sacramento, CA 95814
September 22, 2017	California Environmental Protection Agency Time: 09:30 AM Sierra Hearing Room, 2nd Floor 1001 I Street Sacramento, CA 95814



**STATE OF CALIFORNIA
EMPLOYMENT TRAINING PANEL**
Sacramento City Hall
California Environmental Protection Agency
1001 I Street, Sierra Hearing Room
Sacramento, CA 95814
May 25, 2017

PANEL MEMBERS

Barry Broad
Chair

Janice Roberts
Vice-Chair

Gloria Bell
Member

Will Koch
Ex-Officio Member

Gretchen Newsom
Member

Edward Rendon
Member

Jeff Robinette
Member

Sam Rodriguez
Member

Executive Staff

Stewart Knox
Executive Director

Maureen Reilly
General Counsel

STATE OF CALIFORNIA
EMPLOYMENT TRAINING PANEL
Sacramento City Hall
California Environmental Protection Agency
1001 I Street, Sierra Hearing Room
Sacramento, CA 95814
May 25, 2017

I. PUBLIC PANEL MEETING CALL TO ORDER

Chairman Broad called the meeting to order at 9:39 a.m.

II. ROLL CALL

Present

Gloria Bell

Barry Broad

Gretchen Newsom

Edward Rendon (departed at 12:41 pm)

Janice Roberts

Jefferson Robinette

Sam Rodriguez (departed at 12:47 p.m.)

Absent

Will Koch

Executive Staff Present

Stewart Knox, Executive Director

Maureen Reilly, General Counsel

III. AGENDA

Chairman Broad asked for a motion to approve the Agenda.

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

Motion carried, 7 - 0.

IV. MINUTES

ACTION: Ms. Roberts moved and Ms. Bell seconded the motion that the Panel approve the Minutes from the March 24, 2017 meeting.

Motion carried, 7 – 0.

V. REPORT OF THE EXECUTIVE DIRECTOR

Stewart Knox, Executive Director, said, welcome and good morning Panel members, applicants, and stakeholders. Following the Panel meeting in March, we have a smaller Panel meeting today with approximately \$5.3M in projects with another \$1.6M in Delegation Order for a total of just over \$6.9M.

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

Regarding the Budget for Alternative Fuels and Vehicle Technology Program, \$2M was approved through an Interagency Agreement in partnership with the California Energy Commission (CEC). We have had two proposals in the last few months totaling over \$900,000, leaving approximately \$800,000 for this Fiscal Year (FY).

In regards to Core Funds for FY 2016/17, today the Panel will consider \$5.3M in projects with an additional \$1.6M approved by Delegation Order. Should the Panel approve all the projects today, ETP will have approximately \$0 for the remainder of the Fiscal Year (FY) 2016/17.

Under Delegation Order, all project proposals are capped at \$100,000 to be approved by the Executive Director on a continuous flow basis, and as of today, 29 projects were approved totaling over \$1.6M.

For FY 2016/17 program funding to date, we have approximately 594 projects submitted, with a value of just over \$110M. If all the projects are approved today, the Panel will have approved 440 projects with a value of under \$96M in proposals. Our staff has done a great job.

Regarding applications for contracts that are remaining in the Regional Offices: Single Employer Contract requests are at \$38M; \$0M in allocation. Multiple Employer Contract (MEC) requests are at \$10M; \$0M in allocations. Small Business has \$3.8M in demand; \$0M in allocations. Critical Proposals are at \$630,000 in demand; \$150,000 in allocations. Apprenticeships are at \$2.8M in demand; \$0M in allocations. Overall demand is approximately \$56M.

The number of total projects in the Regional Offices are 223; total number of projects in the Applications and Assessment Unit is 81; overall total of 304.

In terms of legislative updates, we have provided copies for the Panel members. The Employment Training Panel (ETP) is mentioned in a couple of pending bills at this point. We will keep you posted if we receive any new updates.

VI. MOTION TO ADOPT CONSENT CALENDAR PROJECTS

Mr. Knox asked for a motion to adopt Consent Calendar Items #1 through #5.

Armstrong Flooring, Inc.....	\$127,617
Levlad	\$224,340
Los Angeles Pacific College.....	\$146,629
TRL Systems, Inc.....	\$189,000
Waterman Industries.....	\$117,860

Mr. Knox said, Item #1, Armstrong Flooring, Inc. was reduced by 15% from the original amount.

ACTION: Mr. Rendon moved and Ms. Roberts seconded approval of Consent Calendar Items #1 through #5.

Motion carried, 7 – 0.

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

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

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

Motion carried, 7 – 0.

Mr. Broad said, there is a discussion item to move \$2.8M from ETP to fund the Apprenticeship Program at the Apprenticeship Council. If that happens, we would have to reduce the funding for the Apprenticeship Programs. I just want to note that for those who are concerned about apprenticeship. Mr. Knox said, that is a discussion item at this point. I will continue to update the Panel if I hear anything new.

VIII. ACTION ON FUNDING LIMITATIONS FISCAL YEAR 2017/18

Total Projected Budget

Fiscal Year 2014/15: \$81,230,292
Fiscal Year 2015/16: \$98,241,488
Fiscal Year 2016/17: \$97,200,000
(\$89.5M projects approved through March 2017)

Number of Approved Projects

Fiscal Year 2014/15: 413

Fiscal Year 2015/16: 403

Fiscal Year 2016/17: 447 (projected)
(398 approved through March 2017)

Number of Approved Trainees

Fiscal Year 2014/15: 84,964

Fiscal Year 2015/16: 105,143

Fiscal Year 2016/17: 106,416 (projected)
(100,925 approved through March 2017)

ETP Funding Strategies

- Multiple Employer Contracts (MEC)
- Single Employers
- Small Business
- Continue to encourage the Small Businesses to move in MECs
- Critical Proposals and Apprenticeship Program/Non-Traditional Outreach/Women in the Trades
- Limit MECs and Single Employers to once a year funding and 70%
- Allocate funds based on historical demand of these categories. This seemed to work very well the last 3 years in terms of management and oversight of funds.

Mr. Knox said, we will continue to work the Apprenticeship Program and hope that we can increase the number of women in the trades. I think I have quoted some statistics in the past, and we were almost at a 50-50 split; now we are down to 37%. Currently, the program consist of 6% women, and we would like to see that number increase. Maybe we can have a discussion with the Panel, and see how we can increase that number.

Priorities / Sectors

Mr. Knox said, the priority industries that we have this FY are: Manufacturing/Food Production, Biotechnology, Life Sciences, Information Technology Services, Multi-media and Entertainment, Good Movements and Transportation Logistics, Agriculture, Allied Healthcare, Construction, and Green/Clean Technology.

Methods

- Develop around Governor's Office of Business and Economic Development (Go-Biz) /Labor and Workforce Development Agency (LWDA) within each category: Investing in California's workforce – Minimum wage/Industry Certifications
- Non-Traditional Apprenticeships Programs (women/minorities)
- Green Industries
- Critical Proposals/Business Expansion/Retention

- Veterans and Special Populations
- High Speed Rail
- Job Creation
- Training that leads to industry recognized credentials.

Mr. Knox said, we are working with Go-Biz with critical proposals and business expansion, and we will continue to work with them. We have seen a huge spike within the veteran's population, especially with the apprenticeship programs.

Proposed Funding Allocation

Allocation by Category

- Single Employer: \$46M (\$1M increase from the previous year)
- MEC: \$21M ((\$1M increase from the previous year)
- Small Business: \$6M
- Critical Proposals: \$6M (\$1M decrease from the previous year based on usage)
- Apprenticeships: \$14M
- Non-traditional/Special populations: \$2M
- Total: \$95M

Continuation of 38% encumbrance level

Mr. Knox said, the non-traditional and special population's category is new. The total is \$95M; last year, we spent close to \$97M. Some monies were not fully utilized, and that was returned into our account. I also recommend the continuation of the 38% encumbrance level, since that amount works pretty well with the system. Again, the Panel has the authority to move the money around as necessary

Mr. Rodriguez asked, are the Critical Proposals mostly associated with Go-Biz? Mr. Knox said, yes. Typically, we look to Go-Biz, but technically, I do have the authority to bring Critical Proposals to the Panel as well.

Funding Caps

Mr. Knox said, the current and proposed funding caps for contractor by category: MECs \$950,000; single employer \$750,000; small business \$50,000; critical proposal \$900,000; apprenticeship per sponsor \$450,000. The funding caps are working very well; maybe next year, we might have to increase some of the caps.

Mr. Broad said, I think we will have to entertain some notion of capping the number of times you can return for Small Business contracts; possibly to \$15,000, and limit it to once every couple of years, so that you can't do \$99,000, and ask for an increase or return immediately. Coming to ETP, getting \$100,000 in three easy parts just won't work for us, and I want folks in our community to understand that we will not tolerate this kind of stuff, because this is the latest manipulation of our system that we have discovered, and no good or bad deed goes unpunished. We will have to look at a way on how to roll this back to \$50,000, and we are not going to have our system gamed.

Mr. Knox said, we will talk a little bit more later about some of the ideas behind that. Generally, it is a Delegation Order component where we see quite a few that are coming around \$99,000. In the future, maybe we will make an option to drop that down to \$50,000, and that truly might meet the small business needs, but not so much for the larger businesses who are using the Delegation Order.

Funding 17/18

- Continue the current encumbrance rate
- Continue to update Panel of Fund Status by Category at each meeting
- Develop a strategic ETP study/phase in 17/18
- Schedule meetings on priority settings, wages, etc.
- Develop a strategy on Employer outreach and training for specific occupations

Mr. Knox said, we had a stakeholder meeting yesterday and it went very well. We were able to get some input from the stakeholders on behalf of their employers.

Looking Forward

- Develop a “simple” way to work through proposals in the 17/18 fiscal year for determination of funding within each category.
- Does it meet the Panel’s Priority Industry?
- Does it meet the Governor’s Priorities?
- Occupation Specific?
- Special Populations?
- Rural Areas?
- Low Priority: Banking and Lending, Moratorium: adult entertainment, car dealerships, truck driving schools

Priority Setting

- Non-Priority proposals
- Options – Hold in Assessment through December 2017
- Provide Panel General information on Categories being held (Industry Sectors)
- Dollar Value of Projects on Hold
- Remaining Balance within the Fund/Priority Projects in pipeline
- Non-priority projects on hold set a value on in December
- Only on proposals after July 1, 2017, anything already in the pipeline you may see.

Mr. Knox said, we will continue to look at the priority setting, and we will have the Panel vote on all of the components other than priority setting component, and I think we will just leave it a status quo. We have provided you a report of the funding limitations, and my recommendation is we continue with status quo, we won’t hold those, as we were proposing, and I think we’ve come up with some ideas that we may want to look at, and bring back to the Panel in the very near future.

Mr. Broad said, sooner or later, we will have to find a way on how to deal with the cannabis industry. Recreational marijuana and medical marijuana is clearly lawful under California law. There may be a difference between the two, so that deserves a policy discussion and some thoughtful consideration.

Discussion Items

Panel Featured Items

- Health Care Benefits rule making
- Diversify marketing targets, smaller and more contracts/fund study
- Non-priority projects
- Substantial Contribution
- HUA/Regions

On-Going Delivery

- 70% plus 1 year contracting/MECs and Single Employers
- Evaluation of programs
- Industry/MEC Forums
- ETMS and sustainability
- Minimum Wage and ETP's role
- Contingency Funds

Mr. Knox said, we are in the process of requesting between \$6 to \$10M additional dollars in terms of our allocations for the next year; we already received \$6M from last year.

Mr. Broad asked, what if the economy takes a downturn? Mr. Knox said, the Department of Finance wants to have three months operating capital for ETP, which is about \$12 to \$14M, and we are well into that amount. We work for a Governor who is very conservative, and likes to have a large amount, if possible, in terms of economic downturn. I think \$15M, and at this point, we are getting closer to a larger proportion amount than that, so we have requested no more money for the FY 2018/19, and we are always much farther ahead in terms of projections.

Mr. Knox said, our monies goes up fairly quickly because it's based on the Unemployment Insurance (UI) from the private-sector employers, and so as the economy turns the other way, our money drops fast and so we would want to be able to be prepared to make moves in that direction. At this point, we look great; everything is running smoothly.

Mr. Broad said, I have seen the economy take a downturn. So I would like to see a recommendation from staff, should we face a sudden loss of tax revenue. Right now, we are spending lots of money because we have it, but we should have a plan if the funding drops precipitously. When the money goes down as we are approving proposals, we are going to have a difficult time. If we can, we should have a countercyclical policy, so if we hit a recession, we won't slow down on the approval of proposals, and we can ease into a smoother transition, rather than a precipitous fall.

Mr. Knox said, I agree. Our appropriation goes through the Governor's office in terms of approval, and the increase is based on the tax; as the tax increases, our output amount also increases. I have been here for almost three years, and we haven't increased our cap funding, which is good news. Should a downturn happen, we can quickly reduce the caps quickly, and we can look at changing some of the priorities to be more conservative in terms of what we fund.

Mr. Broad said, that works great on the way up, but not on the way down. Mr. Knox said, thankfully it's been going up, so we have had some good news in the last three years, and you live through the 2008, 2009, and 2010 years when it was chaotic.

Ms. Roberts said, the great thing about it is everybody was cooperative when we dropped our funding down to \$350,000; everybody was in agreement.

Mr. Knox said with that, I would look for a recommendation, minus the non-priority proposals components for approval of the action on the funding limitation caps, unless anybody has any questions.

Mr. Broad said, what about this issue of the Small Business category? Mr. Knox said, we have some ideas around the priority setting. If you want, we can bring back a full scope of idea for the June meeting, and that can still work for the July kick off.

Mr. Knox said, in terms of the Delegation Order issue, the Panel has the authority to drop the dollar amount to \$50,000, and anything above that amount will have to go before the Panel. It does not limit the ability of the Delegation Order, it just limits the dollar amount. In other words, it would fall under the Consent Calendar, which is \$250,000. Right now, the Panel only sees the dollar amount under the Delegation Order, and the staff takes the brunt of making the approval decisions based on what we have in front of us; under Consent Calendar, the Panel will be able to view the full proposal. Mr. Broad said, I think I would be more comfortable taking it back down to \$50,000.

Ms. Robert said, we don't know the everything that is on the Delegation Order. Mr. Knox said, Mr. Broad suggested that we bring it down to \$50,000; everything over \$50,000 will now go before the Panel, even if it's under Consent Calendar. Mr. Broad said, we may have a bigger Consent Calendar. Mr. Knox said, yes; we will have a bigger Consent Calendar. Mr. Broad said, I'd be more comfortable with that.

Ms. Reilly said, might I ask, if you would want to continue to have the Delegation Order to specify that matters under \$100,000, could continue Delegation Order, if there is an unexpected loss of quorum, and the Panel meeting is canceled at any given month, which is how we are operating now? Mr. Broad said, isn't that a separate issue? Ms. Reilly said, as long as you continue with that; is that the intent, cap it at \$50,000 ongoing, but if there is a cancellation, allow? Mr. Broad said, I am a little confused. What are you saying? Ms. Reilly said, if the meeting cancels in any given month, for a reason on ETP's part, in other words, that the Delegation Orders could go to \$100,000, so there is some flow basis. Mr. Broad asked, is that only when the Panel meeting is canceled? Ms. Reilly said, yes. In other words, if the Panel meeting is canceled, to allow the \$100,000 proposals to go forward, so that projects can go on a flow basis. Mr. Broad asked, would this be for projects between

\$50,000 and \$100,000? Ms. Reilly said, yes. Mr. Broad said, so they would go forward, even though the Panel does not approve the proposals? Ms. Reilly said, under the delegation of authority, which by statutes is capped at \$100,000. So in other words, the normal cap now is \$50,000, but if the Panel meeting is cancelled, you could allow some things to move forward on a flow basis.

Mr. Knox said, I am good with that. The Panel would still see those proposals at the following Panel meeting. In the past three years, we have had one cancellation for each year, which is not a huge number; I am fine with that, in order to keep the flow moving. Mr. Broad said, OK; that is fine. Can we consider that to be a friendly amendment to the motion? Do we understand what the proposal is? We are dialing it back to \$50,000, but if we cancel the meeting, through no fault of anyone, proposals up to \$100,000 could move forward.

ACTION: Ms. Roberts moved and Mr. Rendon seconded approval to cap the Delegation Order at \$50,000.

Motion carried, 7 – 0.

Ms. Reilly said, for the record Mr. Chairman, I will prepare a Delegation Order revision for you to sign. Mr. Broad said, OK.

IX. REPORT OF THE GENERAL COUNSEL

Ms. Reilly said, this is to provide the Panel with an overview of regulation procedures, in connection with a later presentation concerning potential revisions to ETP program areas. As you will hear, some of those revisions may require a change to existing Panel regulations.

The purpose of regulations is to assist program administration by interpreting the underlying statutory requirements, and making them more specific. The Panel is authorized to adopt regulations at UI Code Section 10205(m). Once adopted, regulations have the force and effect of law, although they must be consistent with the statute.

Regulations are codified by the Office of Administrative Law (OAL) for ease of reference. Panel regulations appear in Title 22, California Code of Regulations Section 4400 et seq. OAL was created under the Administrative Procedures Act (APA) to safeguard the regulatory process. (Govt. Code Section 112340 et seq.)

Regulations are defined in the APA as “a standard of general application.” By way of comparison a guideline is not regulatory. If a guideline were to be applied across-the-board then it could be challenged as an “underground regulation.” As such, all Panel guidelines are implemented on a case by-case basis.

The regulatory process begins with the Panel’s approval of a proposed action to amend, adopt or repeal regulations. In keeping with APA safeguards, this action must be noticed for a 45-day public comment period.

Comments can be presented in writing, or at a hearing scheduled apart from a Panel meeting. The Panel is not required to make revisions in response to public comments, but it

must account for why it did (or did not). If revisions are made in response, they must be noticed for an additional 15-day comment period. Any additional comments must again be considered by the Panel.

Finally, the proposed action is submitted to OAL for a 30-day review period. If OAL approves the action it is filed with the Secretary of State, taking effect 30 days later in order to allow time for codification.

Typically, the rulemaking process takes at least six months to complete.

There were no questions or comment regarding the regulation procedures.

IX. REVIEW AND ACTION ON PROPOSALS

Single Employer

TechStyle Inc.

Ms. Torres presented a Proposal for TechStyle Inc. (TechStyle) in the amount of \$355,740. TechStyle is a company engaged in the design and manufacture of apparel, footwear, and accessories sold in its retail stores and online worldwide.

Ms. Torres introduced Malory Katz.

There were no questions from the Panel,

ACTION: Ms. Roberts moved and Ms. Bell seconded approval of the proposal for TechStyle Inc. in the amount of \$355,740.

Motion carried, 7 – 0.

ARB, Inc.

Ms. Torres presented a Proposal for ARB, Inc. (ARB) in the amount of \$399,024. ARB builds power plants, refineries, and parking structures. The Company also lays underground pipelines, provides cable and conduit installation, fabricates structural steel and provides installation work and horizontal directional drilling for the mining, oil and gas, and utility industries.

Ms. Torres introduced Chris Moulden, Corporate Safety Directory, and Christopher Anderson, VP of Industrial Group.

There were no questions from the Panel.

ACTION: Mr. Rendon moved and Ms. Roberts seconded approval of the proposal for ARB, Inc. in the amount of \$399,024.

Motion carried, 7 – 0.

Auto Center Auto Body, Inc., dba Fix Auto

Ms. Torres presented a Proposal for Auto Center Auto Body, Inc., dba Fix Auto (ACAB) in the amount of \$258,924. ACAB is an auto body collision repair company with 10 locations in Southern California.

Ms. Torres introduced Michelle Farnum, Human Resources Manager, and Jill Muewsen.

Ms. Roberts said, this is a great contract; great wages and veteran component. Keep up the good work.

ACTION: Ms. Roberts moved and Ms. Bell seconded approval of the proposal for Auto Center Auto Body, Inc., dba Fix Auto in the amount of \$258,924.

Motion carried, 6 – 0. (Ms. Newsom stepped away from the dais and was not available to vote.)

L3 Technologies, Inc.

Ms. Torres presented a Proposal for L3 Technologies, Inc. (L3TRF) in the amount of \$489,224. L3 TRF provides high-reliability components and subsystems to space and defense customers worldwide including the US Government and commercial satellite manufacturers.

Ms. Torres introduced Lynette Martin, Vice President of Human Resources, and Paul Johnson.

There were no questions or comments from the Panel.

ACTION: Ms. Roberts moved and Ms. Bell seconded approval of the proposal for for L3 Technologies, Inc. in the amount of \$489,224.

Motion carried, 6 – 0. (Ms. Newsom stepped away from the dais.)

DAA Draexlmaier Automotive of America LLC

Anna Nastari, Foster City Regional Office Manager, presented a Proposal for DAA Draexlmaier Automotive of America LLC (DAA) in the amount of \$749,400. DAA was founded in 1958 by parent company DRÄXLMAIER, headquartered in Vilsbiburg, Germany. DAA manufactures car interior (ambient lighting, consoles, door panels, and instrument panels) and electrical (high-voltage connectors) components for both electric and hybrid vehicles.

Ms. Nastari introduced Sherali Jiwant.

Mr. Broad asked, what do you manufacturer in your Livermore facility? Mr Jiwant said, electrical harness, car door panel, and front panels. Mr. Broad asked, who do you supply to?

Mr. Jiwant said, Tesla, and BMW. Mr. Broad said, so you are a subcontractor to auto manufacturers? Mr. Jiwant said, yes.

Ms. Roberts asked, are you familiar with the ETP program? Do you have any support? Mr. Jiwant said, I have worked for Johnson & Johnson, and we have used this program in the past, and we were successful.

Ms. Roberts said, you don't have any kind of infrastructure that's going to handle this project, and I'm concerned as to how you are going to handle the training; you don't have any support. Mr. Jiwant said, I have a technical trainer, and we are planning on hiring an administrative human resources trainer who can do all the paperwork and input data for ETP. I fully understand that this is not a one-person job. We will have the assistance of the technical trainers.

Ms. Robert said, don't forget to utilize Ms. Nastari and her staff, because they can help you monitor your progress.

Mr. Broad said, we have raised this concern with the first-term applicants who are asking for a lot of money. What we can do is bifurcate this, cut it in half, and have them come back once they have earned the first half, so that they do not underperform. We can make you do this, but it would be nice if you are amenable to it. What we would do is cut the funding in half. Once you have showed performance, you can come back to the Panel, and request for the other half of the funding.

Mr. Jiwant said, I think 50% is too much. Mr. Broad said, I understand this is a significant amount, but this is your first proposal. Ms. Bell said, I agree, and I was going to ask if this project was right size. I agree with Mr. Broad's recommendation.

Mr. Broad said, I make a motion to approve this at half of the requested amount, with the proviso that they can come back for the second half when they have made substantial progress in earning the first half, so we can move forward seamlessly for them.

ACTION: Ms. Newsom seconded approval of the proposal DAA Draexlmaier Automotive of America LLC in the amount of \$374,700. (Original amount requested \$749,400)

Motion carried, 7 – 0.

Sutter Home Winery, Inc.

Mark Mazzone, Sacramento Regional Office Manager, presented a Proposal for Sutter Home Winery, Inc. in the amount of \$522,250. Sutter Home is a family owned winery that produces more than 45 acclaimed wine and spirit brands for distribution worldwide. Customers include retail grocery chains, club stores, restaurants and establishments serving liquor. Sutter Home is applying for training funds on behalf of itself and its affiliate Sierra Sunrise Vineyards dba Torro D'Oro. Training under this proposal will be for their six facilities in California.

Mr. Mazzone introduced Nicola Duffy, Program Manager, Melissa Lomas, Training and Development Managers, Tom O'Brien, Director of Human Resources, and Marlena Griffin, Training Coordinator.

Ms. Newsom asked, on Page 1 of 3, it states that your health benefits is \$18.75. Mr. Knox said, that is an error on our part. Mr. O'Brien said, when you look at our whole suite of benefits, we have a very comprehensive healthcare package, which would include profit-sharing, life insurance, disability insurance, and dental health coverage. The cheapest program that we would have from a healthcare perspective would probably add to about \$3 for an individual, and that would go up from there. So when you look at the \$16 to \$18, it's really more of a total package.

Ms. Newsom asked, how much is being applied to meet the post retention-wage is? Ms. Robert said, that is an error on our part; that has nothing to do with you. Mr. Knox said, that amount should be \$1.70.

There were no further questions from the Panel.

ACTION: Mr. Rodriguez moved and Ms. Roberts seconded approval of the proposal for Sutter home winery Inc. in the amount of \$522,250.

Motion carried, 7 – 0

Multiple Employer Proposals

Southern California Heat & Frost Insulators and Asbestor Workers Joint Apprenticeship Committee

Ms. Torres presented a Proposal for Southern California Heat & Frost Insulators and Asbestor Workers Joint Apprenticeship Committee (JAC) in the amount of \$509,790. JAC was founded in 1962 by a consortium of labor and management organizations to provide training for Insulators and Asbestos workers in Southern California. It's comprised of six members, three each appropriated by the Western Insulation Contractors Association; and the International Association of Heat & Frost Insulators & Allied Workers Union, Local No. 5.

Ms. Torres introduces Tony Magallanes, Administrator and Steve Duscha, Consultant.

There were no questions from the Panel.

ACTION: Ms. Roberts moved and Ms. Newsom seconded approval of the proposal for Southern California Heat & Frost Insulators and Asbestor Workers Joint Apprenticeship Committee in the amount of \$509,790.

Motion carried, 7 – 0.

Orange County Electrical Joint Apprenticeship and Training Fund

Ms. Torres presented a Proposal for Orange County Electrical Joint Apprenticeship and Training Fund (OCETT) in the amount of \$655,010. OCETT is administered jointly between the Orange County Chapter of the National Electrical Contractors Association (NECA) and the International Brotherhood of Electrical Workers (IBEW) Local 441. The Trust is located in Santa Ana. Its mission is to provide up-to-date industry skills training and secure high-quality job opportunities for Journeymen and Apprentices and Pre-Apprentices in four electrical occupations.

Ms. Torres introduced David Lawhorn, Training Director, and John Brauer, Cal Labor Fed.

There were no questions from the Panel.

ACTION: Ms. Roberts moved and Ms. Newsom seconded approval of the proposal for Orange County Electrical Joint Apprenticeship and Training Fund in the amount of \$655,010.

Motion carried, 7 – 0.

San Mateo County Electrical Joint Apprenticeship and Training Committee

Ms. Nastari presented a Proposal for San Mateo County Electrical Joint Apprenticeship and Training Committee in the amount of \$490,158. SMJATC is located in San Carlos. SMJATC is governed by a Board of Trustees comprised of four labor and four management representatives, and is a joint effort of the International Brotherhood of Electrical Workers (IBEW) Local 617 and the National Electrical Contractors Association (NECA).

Ms. Nastari introduced Kathleen Barber, Training Director, and John Brauer.

There were no questions from the Panel.

ACTION: Ms. Roberts moved and Ms. Newsom seconded approval of the proposal for San Mateo County Electrical Joint Apprenticeship and Training Committee in the amount of \$490,158.

Motion carried, 7 – 0.

Valley Roofers & Waterproofers

Mr. Mazzone presented a Proposal Valley Roofers & Waterproofers for Valley Roofers & Waterproofers (Valley Roofers) in the amount of \$112,230. Valley Roofers trains Apprentices and Journeymen in the roofing industry working for small and large businesses in Northern California. This will be the Valley Roofers first ETP Agreement.

Mr. Mazzone introduced Morgan Nolde, Adminsitrator, Carol Pherman, Coordinator, and Steve Duscha, Consultant.

ACTION: Ms. Roberts moved and Mr. Rodriguez seconded approval of the proposal for Valley Roofers & Waterproofers for Valley Roofers & Waterproofers in the amount of \$112,230.

Motion carried, 7 – 0.

Mr. Broad said before we get back to the Agenda, at the request of General Counsel, I want to make some clarifications. The change from \$100,000 to \$50,000 will be effective July 1, 2017. Any new proposals, after today, would be subject to that. For proposals in the application process, those will go through next month.

X. POTENTIAL REVISIONS TO ETP PROGRAM AREAS

Presented by Lis Testa, Planning and Research Unit

Potential Revisions to ETP Program Areas

In an effort to simplify and streamline various areas of the ETP program and processes, staff has been reviewing and brainstorming ideas for potential revision to the following seven areas:

1. Health Care Benefits (p)
 2. Substantial Contribution (r)
 3. Funding Priorities (p)
 4. Wages (p/r)
 5. Reimbursement Rates (p/r)
 6. Non-Traditional Apprenticeships (p)
 7. Delegation Order (p)
- (p – policy change; r – regulation)

1. Health Care Benefits:

ETP Rules

- Unemployment Insurance Code (UIC) 10201 (f) allows Panel to consider voluntarily paid Health Benefits to meet her wage requirement.
 - No dollar amount limits or verification requirements are listed
- Regulation 4418 allows medical, dental, and vision premiums paid by employers to be used to meet the wage. These payments must be reliable and verifiable with documentation.

ETP Current Practice

- Applicants are allowed to use the amounts paid by employers for health, dental, and vision premiums to assist them in meeting the ETP minimum wage.
- Currently, approximately 8-10% of all ETP trainees need to use health benefits to meet the ETP minimum post-retention wage. These trainees are spread over approximately 50% of all ETP projects.

Potential Alternate Options

- Set the maximum amount per hour for health, dental, and vision benefits to \$2.50 per hour.
 - This is the average employer cost for Single Payer plans.

- Health benefits wages must be verified by:
 - Collective bargaining agreement wage tables for those trainees covered by a Union
 - Employer certification for those trainees not covered by a Union.

Mr. Broad asked, if the UIC says that we can count health benefits that are voluntarily paid by employers, what is the legal impact of the employer mandate in the Affordable Care Act? Ms. Reilly said, I have not researched that issue. Mr. Broad said, you might want to research that, because it's not voluntary if the government makes you do it. We might have been in violation of the law here for some period of time. If that is the law, and it remains the law, which of course is an open question itself, or if there is no longer an employer mandate. I believe there is an employer mandate. Ms. Reilly said, at present, yes; it may change. I can render an opinion to the Panel, of course, and it will be confidential, and I will be glad to do so in the near future. Mr. Broad said, I would request that you would do that. Thank you.

2. Substantial Contribution:

ETP Rules

- UIC 10209 (c) allows ETP to require applicants to contribute proportionately more to training workers' at a facility that was already included in a prior project.
- Regulations 4410 (a), (d), and (e) establish the 15%-30% and 30%-50% limits for locations that have earned over \$250,000 in the last five years.

ETP Current Practice

- ETP follows the formula laid out in the Regulations to assess a Substantial Contribution to locations that have earned over \$250,000 in the prior five years.
- In the last five FYs (13-17)* there have been:
 - 53 contracts assessed a 15% Substantial Contribution
 - 36 contracts assessed a 30% Substantial Contribution
 - 13 contracts assessed by a 50% Substantial Contribution
 (*out of approximately 1800 projects)

Practices in Other States

- No other states use Substantial Contribution in the way ETP does.
- Some states put a waiting period for new application for 6 months to a year after the prior project has termed out. (MA, TX, NY)
- One state allows 2 contracts within a 5 years period. (WA)
- One state limits multiple employers to 2 projects per year with a cap of \$80,000, and limits single employers to one project every other year. (FL)

Mr. Broad said, when you say much smaller, what's the second-biggest state? Ms. Roberts said, Texas is the second largest state. Ms. Roberts said, they have a lot of money, but it's very restrictive, and you have to go through the community college to get funded; they don't fund the employer directly. Mr. Broad said, OK.

Mr. Rodriguez said, did you find out why there is a six-month waiting period? Ms. Testa said, it was a way to allow more companies to come through, not certain companies would be monetizing by coming back for contract after contract, especially with a small dollar amount; especially to be able to give money in the state so they wanted to do some kind of limit. Ms. Roberts said, North Carolina has a lifetime cap of \$50,000.

Ms. Testa said, in New York, it's all grants, but they don't have an actual retention training program. In Washington, there was a particular program that only have \$30,000 per year. Ms. Roberts said, that's the Governor's discretionary fund. Washington only funds companies headquartered in their state.

Mr. Rodriguez said, just following on the Vice-chair's question, I think she's referring to states that have a restriction on companies that are multi-state, meaning that there is a preference to companies that are headquartered in their state. Ms. Testa said, I didn't find anything of that in their documents and when I would call them and ask, "Do you have any other limits on your contractors?", and they all said, "No".

Potential Alternate Options

- Single Employer contractors will be subject to Substantial Contribution if:
 - The employer receives two or more contracts with start dates that fall within three consecutive fiscal years
 - The contracts total \$400,000 or more.

3. Funding Priorities

ETP Rules

- UIC 10200 (b) requires Panel to set priorities for projects that reduce layoffs, promote manufacturing, develop career ladders, and / or in other ways enhance California's economy.
- UIC 10214.5 (b) requires Panel to set priority industries.
- Regulation 4405, 4416, and 4402.2 allows ETP to set project caps, limit contract terms, apply in-kind contribution and substantial contribution, give priority to industries, new hires, small businesses, and critical proposals.

ETP Current Practice

- ETP leverages:
 - Priority Industries by NAICS code
 - A subset of these are automatically eligible for Out-of-State Competition funding
 - Critical Proposals
 - Funding Caps
 - Funding Allocations
 - Priority Industries are noted in the Strategic Plan
 - Low Priority Funding project types
 - Adjusting priorities during the course of the Fiscal Year

Potential Alternate Options

- Accept Preliminary Applications for non-priority projects beginning on 7/1/17, but take no action on these projects until Panel assess the demand for priority projects.
- Assessment of demand for priority projects will be scheduled for the December Panel meeting.
- The Executive Director may grant exceptions to this guideline for projects with exceptional potential for the creation of large numbers of high-wage, high-skills jobs.

4. Wages

ETP Rules

- UIC 10200 (a) (1) states that a goal of ETP is to foster the creation and / or retention of high wage, high skilled jobs.
- UIC 10201 (f) defines wage as used by ETP
- Regulation 4418 sets wage criteria, and says that all wages must be reliable and verifiable by ETP contractors.
- Regulation 4409 establishes the SET wage
- Regulation 4429 establishes the HUA wage

ETP Current Practice (1)

- ETP uses a Wage Table that takes into account the state average wage, SET vs OSC funding source, HUA area versus non-HUA area, trainee population, new hire versus retrainee status, county, and standard wage levels.
- All wages may be further adjusted to include health benefits.

ETP Current Practice (2)

Employment Training Panel - Trainee Wages

ETP Minimum Wages for calendar year 2017

(Health benefits may be used to meet all wage requirements, subject to Panel approval)

WAGE NAME	Previous Name	Attributes with the wages
STANDARD		SET Multiple Barriers; HUA; Seasonal Workers; all programs not specified
REDUCED STANDARD	HUA Wage	Approved HUA Waiver; Approved Seasonal Worker Waiver
STATEWIDE AVERAGE	SET Wage	Special Employment Training (SET)
MODIFIED STATEWIDE AVERAGE	SET Wage	Priority Industry; Critical Proposal

STANDARD WAGES			REDUCED STANDARD WAGES (HUA)	
COUNTIES		NEW HIRE	RETRAINEE	
		MINIMUM WAGE AFTER RETENTION	MINIMUM WAGE AFTER RETENTION	MINIMUM WAGE AFTER RETENTION
•Alameda •Contra Costa •Marin •San Francisco	•San Mateo •Santa Clara	\$14.69	\$17.63	\$11.02
•Los Angeles		\$14.13	\$16.96	\$10.60
•Orange		\$14.35	\$17.22	\$10.76
•San Diego		\$13.94	\$16.72	\$10.50
•Sacramento		\$13.72	\$16.46	\$10.50
•All Other Counties		\$13.22	\$16.16	\$10.50
STATEWIDE AVERAGE WAGE (SET)		MODIFIED STATEWIDE AVERAGE WAGE (SET)		
TERM BEGINNING DATE Jan. 1, 2017 - Dec. 31, 2017		\$29.38	<i>Trainees may earn up to 25% below the State average hourly wage. Workers must work in a priority industry sector or be funded for training under a Critical Proposal. This wage modification will be determined on a case-by-case basis</i>	
			\$22.04	

Potential Alternate Options

- Divide the state into two or more regions that reflect the state's economy
 - For example: a lower wage Inland Region (like a HUA) and a higher wage Coastal Region
 - Set an ETP minimum wage \$3 above the state's minimum wage for all trainees (new hires and retrainees) in the Inland Region
 - In the Coast Region, set retrainees at 60% and new hires at 50% of the state average wage.
 - Establish the SET wage at 75% of the state average wage
 - Allow a \$2.50 reduction for Health Benefits for all
- Sample Potential Wage Table

○	○ New Hires	○ Retrainees	○ SET
○ Coastal Region: Standard	○ \$14.69	○ \$17.62	○ \$22.04
○ Coastal Region with Health Benefits	○ \$12.19	○ \$15.12	○ \$19.54
○ Inland Region: Standard	○ \$13.50	○ \$13.50	○ \$22.04
○ Inland Region with Health Benefits	○ \$11.50 (CA State Minimum Wage)	○ \$11.50	○ \$19.54

Mr. Rodriguez said, I understand, at one time, there was a conversation of six regions. Ms Testa said, this is just a suggestion or idea to start everyone thinking to try to look at things in a different way. Mr. Rodriguez asked, are they all economic regions? Ms. Testa said, yes. We could also make regions that go along with the Workforce Development Board; regions that they have. There's a zillion ways we can do it in Northern California, or Southern California, or whatever. These are just some stimulating ideas.

5. Reimbursement Rates

- Currently, ETP's Fixed-Fee Reimbursement Rates are set using a complex combination of over a dozen variables.
- An option would be to simplify our rates down to four rates only: \$8 CBT, \$14 Apprenticeships, \$20 all Retrainees, and \$22 for all Special Populations.
- This is just an example of a potential simplification method.
- Due to the complicated nature of this issue, we will bring this back to the Panel later.

Ms. Reilley said, simple rate setting would not require regulation changes; a structure of how to raise settings would.

6. Delegation Order

- In FY 16-17 so far (through March Panel), there have been 188 projects processed through Delegation Order for a total of nearly \$10.5M.
- In an effort to have Panel engaged in thoroughly reviewing all projects:
 - Cease or limit the Delegation Order process by lowering the Delegation Order project funding limit to \$50,000
 - All projects under \$250,000 would still remain on the Consent Calendar.

7. Non-Traditional Apprenticeships

ETP Rules

- UI 10205 (c) (1) allows ETP contract with group of employers
- Regulation 4400 (j), (3) defines one type of group of employers as the Joint Apprenticeship Training Committees (JATCs)

Current Practice

- ETP accepts JATCs that are Division of Apprenticeship Standards (DAS) approved Program Sponsors as a type of MEC.
- The Related Supplemental Instructions (RSI) portion of the Apprenticeship training is reimbursed by ETP when given in conjunction with an approved Local Educational Agency (LEA).

Potential Alternative Options

- DAS has been starting to approve LEAs as Program Sponsors.
- To parallel this, ETP could develop a new Pilot Program allowing LEAs that hold Program Sponsor approval from DAS to contract with ETP.
 - This new pilot could receive approximately a \$2M allocation.

Next Steps:

- We can bring 3 or 4 of these ideas back to the Panel in June or July for further consideration
 - Which would the Panel like to work on?
 - Note that changing anything with wages and rates will be complicated in the new Employment Training Management System (ETMS).
 - What would the Panel like more information on?

Mr. Broad said, if it's okay with the Panel, what I would like to do is to take public testimonies on this general subject. There are a couple of things that we are interested in hearing. I would also like to have a discussion with Ms. Torres and the rest of the staff regarding the different wages; we don't have to do it today.

Simplifying the process may not be the correct thing to do, if a more complicated process is required by statute to fulfill our statutory mandate. However, I am curious about whether the application of health benefits, and various minimum wage would take an enormous amount of staff time, and with our new ETMS, which is still in its infancy stage, would making the

change in these areas simplify the process, so that it would be more easier for people to use. I would also like to hear from the general public.

Ms. Torres said, we all know every action has a reaction. It is not so simple, even our goal is to simplify. At the end of the day, it's the means to the ends. I would need to have a little bit more time to be able to go through each one of those issues.

Mr. Broad said, are there changes in some of these areas that would affect our ETMS? Mr. Knox said, part of the reason, most of these seven areas that we discussed are based on the new system. We have determined that these are probably, or a portion of these, if we simplify, it would actually simplify a new ETMS system. or a system that comes out of ETMS. It may be a different system, it might be ETMS, or we might have to change drastically. ETMS should not drive what we do; we should drive what ETMS does. I don't want the system to stop us from moving forward. Regardless of the complexities of what ETMS can or cannot do, I don't think we should stop moving forward for ETP. Mr. Broad said that makes sense.

X. PUBLIC COMMENTS

Steve Duscha

I want to emphasize that I'm speaking for myself today. Foes may or may not agree with a lot of what I'm saying. I think the complexity issue is very important, that is why ETMS has been such a mess.

ETP's current wage chart is built into the ETMS. You have four basic wage groups, and each of those wages varies by county, and subgroups within the county. Alameda County is simple; no high unemployment areas in it. It also has an Out-of-State Competition (OSC). By my count there are 24 different wage rates on this chart and there are 170 different jurisdictions, and most of the jurisdictions have to do with high unemployment areas (HUA), which has to do with getting a contractor approval to train people with more wages.

All of this is growing out for reasons that is understandable, but it has created a mess. Then you try to add an old computer system, and it becomes a bigger mess. A couple of my favorite anomalies are in the Los Angeles County, and other HUA, which means you can train incumbent employees for \$12 an hour and new hires for \$10.60 an hour. In the city of Vernon, that is not an HUA, so you get paid a different amount. That is totally ridiculous, because nobody lives in either place because they are industrial cities.

When you look at the numbers, California is really divided by coastal and inland areas in terms of both average wages and average unemployment benefit unemployment rates. It really make sense to divide California into two. The minimum wage that I propose are on the chart that I have provided.

The ETP statute requires ETP to fund high wage high skilled jobs. I don't know what a high wage job is, and I know it's not minimum wage. I don't think it's a dollar above minimum wage. My suggestion is that the Panel should set the minimum; set a minimum without health benefits. I'm suggesting it would be a number that changes as a state minimum wage

goes up to \$15 over the next few years. What McDonald's or Walmart pays should not qualify for ETP funds. I think you need to address the complexity issue, and I think I've seen all of your wrestle with proposals that come to you at a minimum wage. I do not think you like them very much, but you set up a system that allows that, and I think you need to set up a system that sets a higher standard. You have the authority to do this right now, and you need to set a clear standard.

On the health benefits issue, I think you can permit health benefits as long as they are documented, as discussed. I initially thought that didn't work, but I've been corrected on that; it does seem to work, but I don't think you should allow health benefits to take people down to the minimum wage, or even a dollar above the minimum wage. I think you have a responsibility, under the statute, to fund only high wage, high skilled jobs.

I could run through the other issues briefly, but I do not have handouts on the fixed fee issue that also is too complicated, and I look forward to a discussion of that in the near future, because it needs to be simplified as well.

The Substantial Contribution issue needs to be fixed. Once again, I've stood up here and seen that the Panel members are not comfortable with the current system, and the system creates anomalies. We don't know if Substantial Contribution should be at the facility level, which is what the statute says. Should it be at the level of the potato chip factory, or the level of Frito-Lay or PepsiCo? Should it be at the level of Kaiser medical office building, Kaiser Medical Center or statewide Kaiser? Those difficult questions.

On the Delegation Order, process you have made progress. I would do away with it completely. I was once an Executive Director for ETP, and I have a warm spot in my heart for directors; they shouldn't have to take all the rap.

Regarding ETMS, put it out of its agony; that's all I have to say.

Mr. Broad said, with regard to bifurcating the state I understand why we have things they way we do, because what works in one county does not necessarily work in others. I do not know if it would make sense to do it by county.

Mr. Duscha said, there needs to be some rural carve outs. Mr. Broad said, Los Angeles is a complicated area. Mr. Duscha said, we need it to be simplified. Mr. Broad said, I understand, but simplicity does not reflect reality. I do agree; it should be simplified, if we can. Mr. Duscha said, in many cases, it does not reflect reality. Mr. Broad said. that may be explained by the canvas industry.

Mr. Duscha said, ETMS has made it worse, and another thing to remember is that the chart changes quarterly. As new data is released by EDD, the chart changes; that is crazy. I've been around ETP for a long time, and recently one of your former managers, Rosa Hernandez, came to work for me. She and I have argued about what the rules are because they are so complex and we cannot figure them out.

Ms. Roberts said, I have a comment on the health benefits as listed in your presentation. Only 8% to 10% of the people need the health benefits, so I would just do away with them; it's a small portion of the population.

Mr. Dusha said, the problem with health benefits is for the low-wage jobs. Many people don't take it on, and many people sign up for Medi-Cal instead of health benefits if they're getting paid 10 or \$11 an hour. Ms. Roberts said, with all the changes going on right now; if we don't even use them, then it's not an issue anymore; it just simplifies it. Mr. Dusha said, I will let other people argue with that. Ms. Roberts said, I think you were arguing with that earlier. Mr. Dusha said, maybe it's the same thing.

Ms. Newsom asked about the health benefits. Ms. Torres clarified that the verification of the wages comes at the end, which is through the final payment of each retraining.

Ms. Torres said, sometimes we get accused of asking too much question, but it is for the protection of the contractor to make sure that they are properly reimbursed. We asked them all sorts of questions because we want to know if they are going to need healthcare benefits in order to meet the ETP minimum wage. It's complex, but at the same time, it is not.

Ms. Newsom asked, is that where you found the 8% to 10% of the trainees who are receiving that lower wage? Ms. Reilly said, I don't believe health benefits are reported in the payroll; EDD verifies the wages that are paid. This becomes an issue of wage verification, so there's a lot more work that goes into it, and that is one reason why Mr. Knox was proposing a set fixed rate.

Mr. Broad said, correct me if I'm wrong; what the employer gets to count is offering healthcare? Mr. Dusha said, no. Ms. Torres said, it's not the offering. It's the actual part the employer pays towards health benefit.

Mr. Broad said, this is a threshold matter, and we better figure out this legal question first. We may have a situation where we could have to count the benefits statutorily for at least several years.

Ms. Roberts said, Mr. Dusha, I want to thank you for using the analogy of Frito-Lay and PepsiCo in your explanation around Substantial Contribution. The thing is that it is a wishy-washy thing for us, and I know most people gain the system with it because they come in with a higher amount from their previous contract. To me, it just becomes a non-entity; I don't even look at it anymore. Mr. Dusha said, I will take that under advisement the next time we bring Kaiser, but you always gain the system before you bring them any way you do it. Ms. Robert said, don't tell me you don't.

Dorothy Rothrock

Ms. Rothrock said, we really appreciate all the work that the Panel does. The California Manufacturer's has been partners with you for a long time. While I don't know the technical issues around, I just want to reemphasize that they're always available 24-7 to help you with whatever you want to know about how we do the program. Whatever assistance or

problematic feedback you'd like from us, we are available, and we really want this to work for manufacturers particularly, because they are the best employers in the State. California is really challenging place to do business, and it's not getting any easier, and the ETP is one of the best, and one of the most important programs we rely on to keep manufacturers healthy in the State.

Mr. Rodriguez asked, has there been an uptake in manufacturing over the last four and half years in the state of California? Ms. Rothrock said, there's been 4% growth in manufacturing jobs in the state, and the US manufacturing jobs have grown more than 8%, so we are not keeping up with what we see as a national trend of manufacturing growth. We also just have information back from 2016 on the level of investments in California compared to the US in 2016. We only received 3% of the investments for new expansion and new sites out of the United States total. If you assume we are at 10 or 11% of manufacturing here, we are not getting a fair level of new investment in order to maintain that base.

Mr. Rodriguez asked, in terms of expansion in existing manufacturing, has it been relatively stable for the last 20 years? Ms. Rothrock said, when you say stable, there are many things that are happening underneath the surface.

Mr. Rodriguez said, in California, productivity doesn't really match the uptake in employment. It's really been the correlation because of artificial intelligence in automation and technology. Ms. Rothrock said, I don't know how to sort out the impact of all the various elements there. I think it's a combination productivity, because it's simply higher skilled workers, even if the technology remains. There's another shift going on with the types of industries that are remaining in California. Perhaps higher margin, higher wage level; those are the companies that see the value in California.

Mr. Rodriguez said, lastly we, at the Panel we have a genuine interest in really supporting emerging new manufacturing. Ms. Rothrock said, thank you.

John Brauer

Food for thought on the healthcare piece, even outside the construction industry, we have a number of unions and collective bargaining agreement, and health insurance is a big part of that equation. We would like to receive credit for the collective bargaining agreements for the contribution that the employers make in that particular equation.

As far as Substantial Contribution, I'm not familiar with the history, but again, the proposals that go through an apprenticeship program or other labor management program to come with a group of new employees and workers.

Ms. Roberts said, you are not subject to Substantial Contribution. Mr. Brauer said, I want to make people understand why that particular piece is here.

Mr. Brauer said, I would also like to raise the region issue. For example, Monterey and Salinas; those are coastal areas. The State's workforce board and community colleges have divided the regions into 14 sections, and I think there may be some geographical discrepancies in terms of other things, but there is also the idea of employers who are doing

more rounded job quality and aspects and other employers in a particular sector. It is not just the wage aspect, and provision of benefits and pension. The issue of job quality is not your primary purpose.

Lastly, regarding the non-traditional apprenticeship piece, if you end up going forward with that at some point, I think our request would be to be juxtaposed with the existing apprenticeship proposals in terms of performances. The results, overtime, will be ominous.

Mr. Broad said, your point about the retirement is well taken, because retirement is considered deferred wages. We don't count retirement contributions made by the employers as deferred wages, and that is a savings plan for someone at work. We should consider that because that is significant. We could have an employer who pay average, but their retirement contribution is enormous; we don't count it, but we should count it in our system. That is actually easier to calculate than the healthcare piece. Mr. Brauer said, policies that contribute to job quality and promote employers make it better.

Mike Jester

Mr. Jester said, this is complicated, but I do not find it complicated as others do. I have submitted 13 applications through the ETMS; some are in the pre-application stages, and some have been approved, and I do not find it to be difficult. I disagree with what Mr. Duscha said, but we remain friends.

California is, quite honestly, a country. It is hard when you compare it to the world global economy because it is very diverse. It is an amazing state and it should be supported by ETP, and there is a part of our state that has a vibrant economy that takes place in Salinas Valley, and somewhere between Stockton and Bakersfield, which is the agriculture business.

Agriculture is a priority industry, and they are supported by small businesses that are service oriented who are thrown into SET, which causes a few wage problems with regard to qualifying employees.

With regard to frontline worker wages, I personally do not care what you do, but I will note that the 8% to 10% of those numbers will likely skew upward if you look at the Central Valley on its own. It would make a larger impact on us than the rest of the state.

A \$12 an hour job in the McFarland area would be equivalent to an \$18 an hour job in the Pasadena area. A \$12 an hour job with some health benefits may be good for others in the Central Valley because of the relative difference in costs. So if you were to raise the wage up to \$13.50 an hour, then all we are doing is taking away the significant training from the priority industries in the Valley. Even though your heart is in the right place, I believe that what you would be saying in effect, and unintentionally is that an \$18 an hour job for frontline worker in Pasadena is relative to the frontline worker in the Fresno area.

Ms. Robert said, my plants were in the Modesto area, we were paying, at the time, \$20 an hour for manufacturing. Based on your references, are you talking about small manufacturing companies? We were losing employees to our competitors who were paying \$20 an hour, so I'm not sure where you are getting your numbers from.

Mr. Jester said not every manufacturer in the Valley is Pepsi. I have large manufacturers like Foster Farms, ConAgra foods, and I would say the entry levels range between \$13 and \$16 an hour, and not \$20 an hour and my contracts in the books will show you that. Are there some that pay that amount? Absolutely. Some companies start higher rate, and there are smaller midsize manufacturers that don't pay, but that's just a microcosm of the total.

Ms. Robert said, I'd like to know the percentage that pay \$13 an hour, because within 90 days, they may pay at a higher rate than that. Mr. Jester said, not all companies do.

Mr. Jester commented on the Delegation Order cap. Mr. Knox clarified that moving forward, the Delegation Order is now at \$50,000. He has the authority to sign for \$50,000. But the caps can still go to \$200,000.

Mr. Jester said, my point for the entire presentation was that I'm in a different world than most of the people in this room. Decisions that seem fair, or maybe fair for all those other places maybe terribly unfair and exclusionary in my area.

Mr. Rodriguez said, there was a special report on national radio about the agricultural industry in California, particularly in Salinas Valley regarding the picking of lettuce. There is a labor shortage, and the shortage continues. There is a particular company who had 50 robots that would gather the lettuce, and the big challenge is to train the workers to operate the robots. Ultimately, the 50 robots will replace 200 to 400 workers.

Mr. Broad said, hopefully the people who are operating the robots will be making more than minimum wage, because this involves high skills. I can tell you one thing, I will never approve funding for training of robots. That will never, ever happen on my watch. Ms. Robert said, I don't think those robots have Social Security numbers.

Jill Meuwsen

I made a request for the Panel to look at an industry that has never been considered a priority industry. I am the auto body consultant, and most of the proposals from the collision shops were probably presented by me. This industry has a growth of 10% over the next few years, and the average age of a technician is 40 years old. They are going lose 20% of those employees over the next 5 to 7 years. There is a dire need for training employees because a huge training trajectory will take place, and there are many training methods of entry into this industry in terms of training. There are employers that need workers, and those workers will need a lot of training in traffic jam assisting, and other high technology training, and most of the training takes place in an HUA. You had a project come before you today, and they are coming in with a new generation; low wage and they are providing a huge amount of training. They are not your typical college kids; they are skilled trades workers, and I would like the Panel to look at some of the specialized industries that bring high paying jobs, and give them a little more love.

Ms. Roberts said, we don't make a decision whether it comes before us or not. Do you feel that you weren't considered a priority because your proposals were pushed back? Ms. Meuwsen said, industries that are a priority pretty much fly right through. However, I get more questions when I have an auto body shop proposal. Ms. Roberts asked, you do feel

more scrutinized by staff? Ms. Meuwesen said, the wage scale should be look at when a company can bring in a \$14 an hour job, and that job can increase up to \$25 based on an 18-month contract.

Ms. Torres said. I can give a quick example for that instance. Those proposals are funded under SET which has a higher wage requirement. If it is a priority industry, they have the advantage of having a lower minimum wage.

Mr. Broad said, our goal is to produce high wage jobs. Instead of looking at everything as a high wage, priority, or non-priority, maybe we should consider you a priority if you are paying a wage that is 40% above the state average. If you are a high wage employer, you step up to the front of the line, regardless of whether you are a priority industry or not. In an industry like yours, what may happen is that there may be sort of unconscious bias by staff who is looking at your application. I do think that you raised a very good issue here.

Ms. Newsom said, I love the concept of prioritizing high wages. I have heard from friend and colleagues that your industry is still compensating workers by piece rate, or commission based; is that this the case? Ms. Meuwesen said, that is a good question. I have consulted both in Southern and Northern California. Flat rate, which is a flat commission or hourly plus productivity, the wages are still the same.

Ms. Meuwesen said, technicians make close to \$100,000 a year, and an estimator can make up to \$90,000 a year. Since we have lost the auto body shops in high school and community colleges, getting in is difficult because there are so many barriers. We need a long term investment, and not limit us to a two-year contract. You should reward companies that are investing in high paying jobs. So, to answer Ms. Newsom's question, there are still some that pay piece rate, but the end wage are high wages.

Ms. Newsom said, but the worker is always rushed, that is my concern. Ms. Meuwesen said, the employee wants the piece rate because they can make more money. The trend is more towards an hourly rate, and there is still the commission structure, which is prevalent in Southern California. I am asking for a fresh look at this issue, and I appreciate your feedback.

Mr. Broad said. I really appreciate the issues that you have brought forward. Thank you.

Tom O'Brien

We are a California-based company, and everything we do stays here in California. We don't go anywhere else, and we don't outsource. We pay high wages, we have a profit-sharing, and that is not taken into account. We are not allowed to use ETP funding to fund training in sales, which brings in revenue.

Ms. Robert said, regarding investments, you might want to look at Go-Biz incentives that we have here for California. One of them is California Competes Tax Credits, as well as the sales tax exemption that you can get for new manufacturing.

Mr. O'Brien said, we like the idea of simplification, but not closing off stores that are valuable to organizations. I would encourage all of you to contact us keep this discussion going.

XI. MEETING ADJOURNMENT

Mr. Broad adjourned the meeting at 12:51 PM.

Single Employer Contractor

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

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

These features apply to core program funding.

Multiple Employer Contractor

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

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

Retraining

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

New Hire Training

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

These features apply to core program funding.

Delegation Order Process

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



M e m o r a n d u m

To: Panel Members

Date: June 23, 2017

From: Stewart Knox, Executive Director

File:

Subject: Report and Action on the Cannabis Industry in California

California has passed multiple Cannabis related laws, beginning with Proposition 215 Medical Use of Marijuana Initiative/Compassionate Use Act on 11/5/1996, SB 420 Medical Marijuana Program Act on 9/11/2003, and most recently with Proposition 64 California Marijuana Legalization Initiative/Adult Use of Marijuana Act on 11/8/2016.

Proposition 215 and SB 420 dealt only with the medicinal uses of marijuana, while Proposition 64 expands the statewide legal use of marijuana to medical and recreational use among adults. Prop 64 includes guidelines, limits, and penalties on various aspects of the marijuana industry such as business licenses, a taxation system, marketing and advertising, labelling, testing, record keeping, a track & trace system, prior marijuana convictions, and appropriate ages and places for marijuana use. Prop 64 also names the Bureau of Marijuana Control (formerly the Bureau of Medical Cannabis Regulation) as the agency responsible for regulation and licensing of this new industry sector.

The Bureau of Marijuana Control has not yet finalized their regulations, and will not be accepting applications for business licenses until January 1, 2018 at the earliest.

As such, staff recommends placing a Moratorium on all Cannabis Industry and Cannabis Industry related projects. This Moratorium should remain in place until the industry is more established, with regulations and licensure requirements and procedures in place, and with enough data available on industry statistics such as tax revenue, occupations, and industry growth to enable a more thorough analysis of the industry, to see if/how they will fit into ETP's program.



**Panel Amendment #1 Proposal for:
Armstrong Garden Centers, Inc.
Agreement Number: ET16-0360**

Amendment Effective Date: June 24, 2017

Panel Meeting of: June 23, 2017

ETP Regional Office: North Hollywood

Analyst: M. Paccarelli

CURRENT PROJECT PROFILE

Contract Type:	Priority/Retrainee Job Creation Initiative HUA	Industry Sector(s):	Agriculture Retail
Counties Served:	Los Angeles, Orange, San Diego, Riverside, Alameda, Marin, Ventura	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Priority Industry:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Current Contract Term:	January 19, 2016 to January 18, 2018	Substantial Contribution:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

CURRENT FUNDING

Current Funding
\$98,234

AMENDMENT FUNDING

Requested Funding	Total Funding
+\$19,440	\$117,674

AMENDMENT 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	Priority Rate Retrainee	Business Skills, Commercial Skills, Computer Skills, Cont. Improv., HazMat., Mgt. Skills	270	8-200	0	\$414	\$15.60
				Weighted Avg: 23			

Minimum Wage by County: \$16.48 in Los Angeles County; \$16.51 in Orange County; \$16.46 in San Diego County; \$17.02 in Alameda and Marin Counties; and \$15.60 in Riverside and Ventura Counties.

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

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

Up to \$2.86 may be added to meet the ETP minimum wage in Job Number 1

Wage Range by Occupation	
Occupation Title	Wage Range
Growers Staff	\$12.74 - \$30.00
Landscape Design Staff	\$14.00 - \$30.00
Transportation Staff	\$14.00 - \$20.50
Production Staff	\$14.00 - \$30.00
Administrative Staff	\$14.00 - \$30.00
Accounting Staff	\$14.00 - \$30.00
Marketing Staff	\$14.00 - \$30.00
Sales Staff	\$14.00 - \$30.00
Retail Staff	\$14.00 - \$19.50
Manager	\$14.00 - \$16.50

INTRODUCTION

Founded in 1889, Armstrong Garden Centers, Inc. (AGC) is an employee-owned company serving the horticultural industry for over 125 years. It is headquartered in Glendora with three production growing facilities in Santa Paula, Fallbrook, and Bermuda Dunes; and 32 retail locations nationwide.

AGC has over 200 acres of growing and production facilities in California. The Company supplies retail locations, as well as other independent garden centers, commercial accounts, resorts and golf courses throughout most of the Southwest and Pacific Northwest.

AMENDMENT DETAILS

AGC is requesting to increase the weighted average hours of training from 19 to 23. As a first time ETP Contractor, AGC submitted a conservative training plan. There is sufficient time remaining in the term of contract for the additional hours to be delivered.

In summary:

- The funding amount will increase by \$19,440, from \$98,234 to \$117,674.
- The weighted average hours in Job Number 1 will increase from 19 to 23.
- The average cost per trainee in Job Number 1 will increase from \$342 to \$414.

RECOMMENDATION

Staff recommends approval of this Amendment.

CURRENT CONTRACT PERFORMANCE

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

Agreement No.	Approved Amount	Term	No. Trainees Enrolled	No. Completed Training	No. Retained
ET6-0360	\$98,234	01/19/16 - 01/18/18	852	0	0

To date, 5,252 eligible training hours have been tracked (97% of the current Agreement amount).

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

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- Product Knowledge
- Customer Service
- Leadership
- Project Management
- Team Building
- Inventory
- Merchandising
- Sales Skills
- Conservation
- Time Management

COMMERCIAL SKILLS

- Agriculture Training
- Production Training
- Equipment Operation
- Horticulture
- Water Practice
- Growing Techniques
- Shipping and Logistics
- Order Fulfillment
- Driving & Delivery Techniques

COMPUTER SKILLS

- Manufacturing Resource Planning (MRP)
- Microsoft Office Suite (Advanced & Intermediate)
- POS System

CONTINUOUS IMPROVEMENT

- Process & Quality Improvement
- Growing Improvement

HAZMAT

- Hazardous Materials Handling

MANAGEMENT SKILLS (For Managers Only)

- Management Training

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



Training Proposal for:
Bakersfield Pipe and Supply, Inc.

Agreement Number: ET18-0105

Panel Meeting of: June 23, 2017

ETP Regional Office: North Hollywood

Analyst: M. Webb

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate HUA	Industry Sector(s):	Wholesale Trade Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Counties Served:	Fresno, Imperial, Kern, Los Angeles, San Joaquin, Shasta, Ventura	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
Number of Employees in:	CA: 130	U.S.: 200	Worldwide: 200	
<u>Turnover Rate:</u>	14%			
<u>Managers/Supervisors:</u> (% of total trainees)	15%			

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	=	Total ETP Funding
\$166,140		\$0		\$166,140

In-Kind Contribution:	100% of Total ETP Funding Required	\$256,992
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Continuous Improvement, Literacy Skills, Management Skills	108	8-200	0	\$1,278	\$16.16
				Weighted Avg: 71			
2	Retrainee Priority Rate HUA	Business Skills, Computer Skills, Continuous Improvement, Literacy Skills, Management Skills	22	8-200	0	\$1,278	*\$12.12
				Weighted Avg: 71			

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

Minimum Wage by County: Job Number 1: \$16.96 per hour for Los Angeles County; and \$16.16 per hour for Kern, Fresno, Imperial, San Joaquin, Shasta, and Ventura Counties.

Job Number 2 (HUA): \$12.12 per hour for Kern, Shasta, Imperial, and San Joaquin Counties.

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

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

Up to \$2.96 per hour may be used to meet the Post-Retention Wage in Job Number 1 and \$1.62 per hour in Job Number 2.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Warehouse/Operations Staff	\$14.00-\$23.36	23
Warehouse Supervisor	\$18.67-\$28.84	6
Inside Sales Staff	\$16.71-\$35.13	26
Outside Sales Staff	\$23.07-\$55.00	15
Assistant Manager	\$26.44-\$41.82	6
Branch Manager	\$33.65-\$51.92	12
Administrative Staff	\$16.67-\$52.88	20
Job Number 2 (HUA)		
Warehouse/Operations Staff	\$10.50-\$16.16	22

INTRODUCTION

Founded in 1968, Bakersfield Pipe & Supply (BPS) (Bakersfieldpipe.com) distributes pipes, valves, fittings, and supplies. BPS also conducts business affairs that include assembly and pipe customization (manufacturer). BPS is headquartered in the city of Shafter and includes 17 locations across the nation. A total of 8 California locations will participate in training under this Agreement. Industries that utilize BPS services are agriculture, oil and gas, construction, industrial, government and the mining industry. This will be BPS's first ETP Agreement.

PROJECT DETAILS

A thorough assessment has been conducted by BPS staff to identify areas of improvement at each California location. A review of current processes and systems has led the Company to develop new initiatives that will increase efficiency, productivity, and sales. Major initiatives that will be implemented over the next year will focus on ISO 9001 integration, warehouse operational efficiencies, new pricing analytics system and processes, ERP system training, sales training, and leadership training. Comprehensive training will be provided to all departments to improve employee skill sets.

The training plan created by company department heads will include Computer Skills training to ensure staff can utilize software programs to complete daily job tasks. Equipment recently purchased include pricing analytics software, an Enterprise Resource Planning System (ERP), and an RF scanning system. Training provided will improve analytical skills and teach staff new pricing strategies to maximize margins. Trainees will also learn to utilize functions available via the ERP system to integrate business such as product planning, inventory, materials, and sales.

Additional training included in the company's training plan will focus on Business Skills and Continuous Improvement topics that will improve employee skill sets. Training provided will include a two-day training course on a restructured sales technique known as solution selling to identify sales opportunities and maintain strong customer relationships. Course topics such as Communication, Business Performance, and Process Improvement will ensure staff has the knowledge and capability to identify areas of the production process that may require improvement, and are able to communicate and work with managers and fellow staff to improve operations, and complete job tasks efficiently.

Training Plan

Training will be delivered by in-house subject matter experts. Training will help the company meet sales goals, implement new processes, and improve computer software usage to complete tasks. Trainees will receive between 50 to 95 hours of training focused on team work, communication, leadership, computer programs, and literacy training. Training is scheduled to begin July 2017.

Business Skills (30%): Training will be offered to all occupations to increase efficiency and improve communication skills. Topics will include Business Performance, Industry Training, and Communication Skills.

Computer Skills (25%): Training will be offered to Managers/Supervisors, Administrative Staff, and Inside/Outside Sales Staff. Training will enhance employee skills and increase the use of software programs to complete tasks.

Continuous Improvement (30%): Training will be offered to all occupations to teach staff BPS operating procedures, integrate ISO 9001 processes, and to utilize company systems and equipment.

Literacy Skills (5%): Training will be offered to all occupations who speak English as a second language to improve verbal and written communication skills. These fundamental skills will better prepare staff to comprehend and complete more complex training and enhance career growth.

Management Skills (10%): Training will be offered to Managers and Supervisors to improve leadership and management skills within the organization. Training courses include Conflict Resolution, Performance Management, Delegation, and Change Management.

Commitment to Training

BPS spends between \$30,000-\$40,000 annually on training at each facility. The Company currently provides safety training, online training, and on-the-job training. Training is job-specific and companywide.

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

Three BPS employees have been assigned to administer this training project: The Human Resource Manager, a Human Resource Assistant, and the Quality Control/Safety Manager. Project staff will ensure Managers and Supervisors are familiar with ETP requirements for documentation and will work alongside them to schedule training, and complete, and collect all training rosters. Assistant managers at each location will be responsible for coordinating and meeting with the internal training team to ensure recordkeeping requirements are met, training is on-going, and rosters are collected in a timely manner. Staff will also perform data entry, meet with ETP staff, and coordinate training at all facilities that will receive training under this Agreement.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

N/A

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

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- Sales
- Communication Skills
- Business Performance
- Industry Training

COMPUTER SKILLS

- ERP Training
- Microsoft Office

CONTINUOUS IMPROVEMENT

- ISO
- Team Building
- Process Improvement
- Leadership Skills for Frontline Supervisors
- Safety*

MANAGEMENT SKILLS (Managers and Supervisors Only)

- Conflict Resolution
- Delegation
- Change Management
- Performance Management
- Sales Management

LITERACY SKILLS**

- Vocational English-Verbal and written Communication skills

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

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

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



**TRAINING PROPOSAL FOR
BERNARD BROS INC
17- 0510**

Panel Meeting Date: 06/23/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Romero, Jela
Type of Proposal: Single Employer Contract (SE)
Funding Source: Out-of-State Competition (OSC)

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$127,224.00			
Program & Admin Cost	Support Cost	Substantial Contribution (\$ / %)	Total In-Kind
\$127,224.00	N/A	N/A	\$463,000.00

APPLICANT PROFILE

<i>Company Summary</i>	Bernard Bros Inc, (Bernard) is a multidisciplinary commercial builder and construction management company that provides full range construction and technical services in all variations of General Contracting, Construction Management, and Program Management.
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<i>Industry Sector(s)</i>	Construction
<i>Priority Industry</i>	Yes
<i>No. of Employees (Applicant)</i>	State: <u>248</u> US: <u>248</u> World Wide: <u>248</u>
<i>Turnover Rate (Applicant)</i>	13.44%.
<i>Repeat Contractor</i>	No
<i>High Unemployment Area</i>	Yes
<i>Unions</i>	None

TRAINING PROFILE

Training Objective

Provide training in sustainable and energy efficiency design, construction practices and computer modeling technologies used in Building Information Modeling (BIM) and Virtual Design and Construction (VDC).

Training is summarized below. Additional details are provided in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# of Trainees	Reimbursement Rate	Avg. Hours	Cost Per Trainee	Min – Max Hour
1	Retrainees	228	\$18	31	\$558.00	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details on the proposed Training Project.

1. Company Background

Founded in 1974 and headquartered in San Fernando, with four additional regional offices throughout California (Irvine, Ontario, Fresno and San Luis Obispo), Bernard is a multidisciplinary commercial builder and construction management company that provides full range construction and technical services in General Contracting, Construction Management, and Program Management. Customers include developers, corporations, educational institutions and public agencies.

2. Current Training Project Details

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

<i>Purpose of Training</i>	<p>The construction industry is experiencing increasing demand for construction of new structures and modification of older structures. To respond to market demand, Bernard needs to effectively adapt to changes in the construction industry. Employees require substantial training in construction techniques, regulations in energy utilization and efficiency (LEED), and building design, to meet industry standards. Technology advances in Building Information Modeling (BIM) and Virtual Design and Construction (VDC) disciplines are also critical training needs of the Company.</p> <p>In addition, as a full-service construction company handling all aspects and variations involved in general contracting, construction management, and program management, Bernard must provide continuous training in planning, personnel role definition, and teamwork. Training will allow the Company to achieve streamlined processes, increase productivity and improve customer satisfaction.</p>
<i>Training Infrastructure and Administrative Plan</i>	Bernard has retained the services of Training Refund Group for administration of the ETP project. Bernard's Training Development Manager at the San Fernando facility will oversee all other aspects including scheduling training and ensuring training completion is documented for ETP reimbursement. Each facility will have a designated administrator to assist with administration. Training will be delivered by a combination of in-house staff and outside vendors.
<i>Marketing Plan</i> (MEC Only)	N/A
<i>Support Cost Description</i> (MEC Only)	N/A
<i>Substantial Contribution Description</i>	N/A

3. Sample Curriculum

Provided below is a summary of the methods by which training will be delivered including a sample of the courses that will be offered.

Each of the Trainee groups will be able to take courses under the various delivery methods.

Delivery Method	Classroom/Simulated Laboratory
Training Type/Level	Sample Classes
Business Skills	Communications
	Interpersonal Skills
	Leadership
Commercial Skills	LEED Field Operations Procedures
	Construction Best Practices
Computer Skills	Advanced Digital Document Management
	Advanced Blue Beam Basics
Hazardous Materials	OSHA 10/30

4. Additional Company or Training Project Details – Keep all subparagraphs

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

4.1 Program Waivers

The next table lists the various waivers and supporting justifications for training that apply to this proposed Training Project.

Waivers/Justification Type	Summary
N/A	

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost
Development	Training Refund Group		\$5,000.00
Administrative	Training Refund Group		13% of earned funds
Training	None to Date		

4.3 Previous ETP Project Summary -

N/A

4.4 Supporting Panel Proposal Documentation

Provided in Attachments 1, 2 and 3 is additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 1 – Group and Job Title Details

The proposed Training Project includes training for the following Trainees, organized by training group.

Group #: 1 – <Retrainees>				
County		ETP Minimum Wage		
Fresno County		\$16.16		
Los Angeles County		\$16.96		
Orange County		\$17.22		
San Bernardino County		\$16.16		
San Luis Obispo County		\$16.16		
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post-Retention Wage
Fresno County				
Administrative	3	\$12.00 - \$41.00	\$4.16	\$16.16
Project Development	1	\$51.00 - \$80.00	\$0.00	\$51.00
Los Angeles County				
Administration	36	\$51.00 - \$80.00	\$0.00	\$51.00
Finance	15	\$24.00 - \$50.00	\$0.00	\$24.00
Project Development	19	\$12.00 - \$41.00	\$4.96	\$16.96
Project Engineer 1	44	\$21.00 - \$50.00	\$0.00	\$21.00
Project Engineer 2	10	\$25.00 - \$40.00	\$0.00	\$25.00
Project Manager 1	47	\$21.00 - \$50.00	\$0.00	\$21.00
Project Manager 2	41	\$50.00 - \$79.00	\$0.00	\$50.00
Orange County				
Administration	1	\$12.00 - \$41.00	\$5.22	\$17.22
Project Engineer	1	\$25.00 - \$47.00	\$0.00	\$25.00
Project Manager 1	1	\$34.00 - \$60.00	\$0.00	\$34.00
San Bernardino County				
Administration	3	\$12.00 - \$40.00	\$4.16	\$16.16
Project Development	1	\$51.00 - \$80.00	\$0.00	\$51.00

Attachment 1 – Group and Job Title Details

Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post-Retention Wage
Project Manager 1	4	\$34.00 - \$60.00	\$0.00	\$34.00
<i>San Luis Obispo County</i>				
Administration	1	\$24.00 - \$50.00	\$0.00	\$24.00

Attachment 2 – Training Delivery and Curriculum Listing

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

<i>Delivery Method/Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type/Level	Planned Course Offerings
<i>Business Skills</i>	
	Accounting/Auditing
	Best Practices
	Change Management
	Coaching
	Communications
	Conflict Management
	Decision Making
	Employee Engagement
	Forecasting
	Insurance Fundamentals
	Interpersonal Skills
	Leadership
	Problem Solving/Process Improvement
	Project Management
	Risk Management
	Subcontractor Management
	Time Management
<i>Commercial Skills/Standard</i>	
	Construction Best Practices
	LEED Field Operations Procedures
	Quality Control
	Scheduling Basics
<i>Computer Skills/Standard</i>	
	Accounting
	Advanced Blue Beam Basics
	Advanced Digital Document Management
	Intermediate Microsoft Office
	Last Planner Scheduling System
<i>Hazardous Material Skills</i>	
	OSHA 10
	OSHA 30

Attachment 3 - Training Project Characteristics Details

Provided in the table are details on the training characteristics.

Characteristic	Program Summary
None	Standard retrainee program with no additional characteristics.



TRAINING PROPOSAL FOR
Blue Mountain Construction Services, Inc.
17-0567

Panel Meeting Date: 06/23/2017
Regional Office: Sacramento Regional Office
Analyst Name: Lazarewicz, Jana
Type of Proposal: Single Employer Contract (SE)
Funding Source: Out-of-State Competition (OSC)

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$249,778.00			
Program & Admin Cost	Support Cost	Substantial Contribution (\$ / %)	Total In-Kind
\$249,778.00	N/A	N/A	\$425,000.00

APPLICANT PROFILE

<i>Company Summary</i>	Headquartered in Vacaville, Blue Mountain Construction Services, Inc. (Blue Mountain) is a family owned and operated company that provides construction services including HVAC, electrical, and plumbing. In addition, Blue Mountain manufactures HVAC ducting, valves, sheet metal connectors, and air distribution boxes.
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<i>Industry Sector(s)</i>	Construction, Manufacturing
<i>Priority Industry</i>	Yes
<i>No. of Employees (Applicant)</i>	State: <u>450</u> US: <u>450</u> World Wide: <u>450</u>
<i>Turnover Rate (Applicant)</i>	4.00%.
<i>Repeat Contractor</i>	No
<i>High Unemployment Area</i>	No
<i>Unions</i>	N/A

TRAINING PROFILE

<i>Training Objective</i>	Blue Mountain reports increasing in demand for construction services due to a resurgence in the Northern California housing market. To meet this demand, Blue Mountain has invested in new equipment and technology and will train staff in processes that will increase productivity, efficiency, and skills.
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Training is summarized below. Additional details are provided in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# of Trainees	Reimbursement Rate	Avg. Hours	Cost Per Trainee	Min – Max Hour
1	Retrainees	377	\$18.00	33	\$594	8-200
2	Retrainees, Job Creation	38	\$20.00	34	\$680	8-200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details on the proposed Training Project.

1. Company Background

Founded in 1981 and located in Vacaville, Blue Mountain provides renovation and new construction services for residential and commercial customers in the areas of heating, ventilation and air conditioning (HVAC), electrical, and plumbing. In addition, Blue Mountain manufactures HVAC ducting, valves, sheet metal connectors, and air distribution boxes.

Blue Mountain's business model combines HVAC, plumbing, and electrical work skill sets as well as a manufacturing component. The model allows tasks that were previously completed separately to be completed simultaneously. This shortens project completion time and reduces project cost. The Company services customers in the Bay Area and Central Valley, from as far north as Yuba City and Santa Rosa to as far south as Bakersfield.

2. Current Training Project Details

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

<i>Purpose of Training</i>	<p>Blue Mountain has invested over \$1M on a new press machine, cutting machine, welding equipment and sheet metal fabrication machines. New machinery requires Blue Mountain to provide its workers with technological and process training necessary to be more efficient and productive. Blue Mountain is also upgrading its Enterprise Resource Planning (ERP) system to improve management of estimates, purchases, invoicing, and scheduling. Training is necessary for employees to effectively navigate the system and improve processes.</p> <p>Blue Mountain has emphasized the importance of upgrading other skills. Management will receive training in team building, leadership, and supervisory skills. All field and shop staff will receive training in standardized procedures. Training for these occupations will consist of classroom and hands-on training conducted by in-house experts.</p> <p>Blue Mountain also requests training for new employees. The Company has committed to hiring 38 employees to support the increased business as well as the opening of an additional location in Fresno by September 2017. The Company will be hiring Communities Staff, Administration Staff, HVAC Staff, Plumbers, Repair and Construction Staff, and Shop Staff.</p>
<i>Training Infrastructure and Administrative Plan</i>	<p>Blue Mountain's Director of Human Resources will be tasked with scheduling, trainee enrollment, roster collection, verifying training and retention, participating in ETP monitoring activities and ensuring compliance with all ETP requirements. The Company's Vice President and Safety & Training Manager will also assist in the coordination of training at both facilities. Blue Mountain has also retained the services of a third-party administrator with extensive ETP experience to assist with administration.</p>
<i>Marketing Plan</i> (MEC Only)	N/A
<i>Support Cost Description</i> (MEC Only)	N/A

Substantial Contribution Description	N/A
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3. Sample Curriculum

Provided below is a summary of the methods by which training will be delivered including a sample of the courses that will be offered.

Each of the Trainee groups will be able to take courses under the various delivery methods.

Delivery Method	Classroom/Simulated Laboratory
Training Type/Level	Sample Classes
Business Skills	Accounting Techniques
	Customer Service
	Project Management
Commercial Skills	Blue Print Interpretation
	Duct Board Fabrication
	Metal Fabrication
Computer Skills	Computer Aided Design (CAD)
	HRIS Systems
	Spectrum ERP
Hazardous Materials Skills	Hazardous Materials Cleaning/Handling
	Hazardous Materials Disposal/Storage
Literacy Skills	Basic English - Language
	Basic English - Written
	Basic Math
Management Skills	Coaching Skills
	Decision Making
	Team Building
Delivery Method	Productive Lab
Training Type/Level	Sample Classes
Commercial Skills	Drywall & Stucco Preparation
	HVAC Installation & Maintenance
	Plumbing Installation & Repair

4. Additional Company or Training Project Details

Productive Lab Justification Summary:

Certain training cannot be replicated in a class/lab environment. Productive Lab (PL) training will allow hands-on experience in a working environment.

Blue Mountain is requesting up to 60 PL training hours for 313 HVAC Staff, Plumbing Staff, and Repair & Reconstruction Staff. Trainees will require up to 60 hours per-trainee to learn to operate multiple equipment. Equipment to be used during PL includes presses, pneumatic machines, plasma cutters, Computer Numerical Control (CNC) machines, as well as general equipment and tools utilized in the field by installers and repair

professionals. Trainers will be by subject-matter experts with demonstrated knowledge and expertise in the field, dedicated to training delivery during all hours of training. PL will not exceed 1:1 trainer-to-trainee ratio.

4.1 Program Waivers

The next table lists the various waivers and supporting justifications for training that apply to this proposed Training Project.

Waivers/Justification Type	Summary
N/A	

4.2 Subcontractor Summary

Blue Mountain retained the services of the following Subcontractor(s).

Subcontractor Type	Subcontractor Name	City	Service Cost
Development	Propel Consulting Group	El Dorado Hills	\$18,600.00
Administrative	Propel Consulting Group	El Dorado Hills	7.5%
Training	N/A		

4.3 Previous ETP Project Summary

Blue Mountain does not have an active or previous ETP Agreement within the last five years.

4.4 Supporting Panel Proposal Documentation

Provided in Attachments 1, 2 and 3 is additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 1 – Group and Job Title Details

Attachment 1

The proposed Training Project includes training for the following Trainees, organized by training group.

Group #: 1 – Retrainees				
County		ETP Minimum Wage		
Solano		\$16.16		
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post Retention Wage
Solano County				
Administration Staff	20	\$16.16 - \$26.00	\$0.00	\$16.16
Communities Staff	25	\$16.16 - \$22.00	\$0.00	\$16.16
HVAC Staff	151	\$16.16 - \$22.00	\$0.00	\$16.16
Plumbers	30	\$16.16 - \$22.00	\$0.00	\$16.16
Repair & Construction Staff	102	\$16.16 - \$22.00	\$0.00	\$16.16
Shop Staff	49	\$16.16 - \$22.00	\$0.00	\$16.16

Group #: 2 Retrainees, Job Creation				
County		ETP Minimum Wage		
Solano		\$16.16		
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post Retention Wage
Communities Staff	2	\$16.16 - \$22.00	\$0.00	\$16.16
Administration Staff	2	\$16.16 - \$26.00	\$0.00	\$16.16
HVAC Staff	10	\$16.16 - \$22.00	\$0.00	\$16.16
Plumbers	10	\$16.16 - \$22.00	\$0.00	\$16.16
Repair & Construction Staff	10	\$16.16 - \$22.00	\$0.00	\$16.16
Shop Staff	4	\$16.16 - \$22.00	\$0.00	\$16.16

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method</i>	<i>Classroom/Simulated Laboratory</i>
Training Type	Planned Course Offerings
<i>Business Skills</i>	
	Accounting Techniques
	Customer Service
	Product Knowledge
	Project Management
	Sales Presentation
	Written Communications
<i>Commercial Skills</i>	
	Blue Print Interpretation
	Carpentry Skills
	Drywall & Stucco Preparation
	Duct Board Fabrication
	Equipment Operation
	HVAC Installation & Maintenance
	Machining
	Metal Fabrication
	Plumbing Installation & Repair
	Project Estimation
	Structure Painting Techniques
	Tool Operation
	OSHA 10/30
<i>Computer Skills</i>	
	BuildPro Sales Systems
	Computer Aided Design (CAD)
	ERP Systems & Processes
	HRIS Systems
	IT Networking
	Microsoft Office - Intermediate/Advanced
	Spectrum ERP
	BirdDog
<i>Hazardous Materials</i>	
	Hazardous Materials Cleaning/Handling
	Hazardous Materials Disposal/Storage
<i>Literacy Skills</i>	
	Basic English - Language
	Basic English - Written

Attachment 2 - Training Delivery and Curriculum Listing

<i>Delivery Method</i>	<i>Classroom/Simulated Laboratory</i>
Training Type	Planned Course Offerings
	Basic Math
<i>Management Skills</i>	
	Coaching Skills
	Conflict Resolution
	Decision Making
	Leadership Skills
	Team building
<i>Delivery Method</i>	<i>Productive Lab (PL)</i>
Training Type	Planned Course Offerings
<i>Commercial Skills</i>	
	Blue Print Interpretation
	Carpentry Skills
	Drywall & Stucco Preparation
	Duct Board Fabrication
	Equipment Operation
	HVAC Installation & Maintenance
	Machining
	Metal Fabrication
	Plumbing Installation & Repair
	Project Estimation
	Structure Painting Techniques
	Tool Operation

Attachment 3 - Training Project Characteristics Details

Provided in the table are details on the training characteristics.

Characteristic	Program Summary
Retrainee - Job Creation	<p>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.</p> <p>The Panel incentivizes job creation. Training for newly-hired employees is reimbursed at a higher rate, and trainees are subject to a lower post-retention wage. Substantial Contribution and Turnover Rate penalty requirements do not apply. Employer must demonstrate expanded or new facilities, new equipment or machinery, expanded business capacity or other measureable investment in hiring workers and expanding their California workforce. A trainee whose employment is “Temp-to-Permanent”, “seasonal”, or “part-time” may be considered newly-hired, but employment retention cannot begin until trainee is a permanent full-time employee on Contractor payroll.</p>



TRAINING PROPOSAL FOR
Emerald Packaging, Inc.
17-0691

Panel Meeting Date: 06/23/2017
Regional Office: San Francisco Bay Area Regional Office
Analyst Name: Woodside, Diane
Type of Proposal: Single Employer Contract (SE)
Funding Source: Out-of-State Competition (OSC)

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$138,312.00			
Program & Admin Cost	Support Cost	Substantial Contribution (\$ / %)	Total In-Kind
\$138,312.00	N/A	N/A	\$372,000.00

APPLICANT PROFILE

<i>Company Summary</i>	Founded in 1963, Emerald Packaging Inc., (Emerald) www.empack.com is one of the largest flexible packaging manufacturers on the West Coast. The Company provides printing, laminating, and converting processes for roll stock, bags, and pouches. Services include package design and high-definition print options. The Company's manufacturing plant in California is located in Union City.
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<i>Industry Sector(s)</i>	Manufacturing
<i>Priority Industry</i>	Yes
<i>No. of Employees (Applicant)</i>	State: <u>261</u> US: <u>276</u> World Wide: <u>276</u>
<i>Turnover Rate (Applicant)</i>	14.00%
<i>Repeat Contractor</i>	No
<i>High Unemployment Area</i>	No
<i>Unions</i>	None

TRAINING PROFILE

<i>Training Objective</i>	ETP funds will help Emerald establish its first formal training program structured to incorporate safe and efficient machine operation throughout the entire production facility. New and retrofitted equipment has been installed requiring extensive training from the Original Equipment Manufacturer (OEM). The cost of training was not included in the purchase price. ETP will also fund cross-training for production employees.
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Training is summarized below. Additional details are provided in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# of Trainees	Reimbursement Rate	Avg. Hours	Cost Per Trainee	Min – Max Hour
1	Retrainees	226	\$18.00	34	\$612	8-200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details on the proposed Training Project.

1. Company Background

Emerald's packaging incorporates standard and highly customized material ranging from carbon-based resins to plant-based films. Product options include aeration (laser micro-perforation); converting (bags and stand-up pouches); specialized zippers, and a variety of other closures. Emerald invests in research and quality control, to develop, analyze, and test its packaging.

The Company's primary customers include produce packing companies that use flexible plastic packaging. This packaging is used for pre-cut salads, baked goods, candy and confections, fresh produce, dried fruits and nuts, pet food, snacks, and frozen fruit and vegetables. Customers include Dole, Del Monte, American Licorice Company, organicgirl, Taylor Farms, Homegrown Organics, and Fresh Express.

The Company represents that its market share is strong and business is expanding. This is an outgrowth of its emphasis engineering materials for bio-based products; developing next-generation packaging utilizing electronics to communicate with consumers; and investing in advanced equipment and technologies. These investments result in higher quality graphics, and meet the food industry's demand for new products such as laser-perforated packages with increased breathability.

Emerald can print over 500,000 pounds of packaging film each week on seven printing presses. Its 225,000 square foot production facility in Union City also provides customized distribution methods so that products reach consumers on time and with optimum freshness. Training will focus on the production workforce. Emerald also employs material scientists, engineers, designers, and customer service specialists.

2. Current Training Project Details

Provided here are details on the purpose of the training.

<i>Purpose of Training</i>	<p>The primary purpose of training is to increase the skills of frontline production and supervisory staff. Manufacturing Skills training will consist of classroom/lab and Productive Lab delivery to increase machine operating skills and improve productivity. Training will include troubleshooting and maintenance to improve machine longevity. This training will focus on the Company's newly purchased \$1 Million, eight-color printing press.</p> <p>Business Skills training will focus on improving communication, building a sense of collaboration through teamwork, and creating consistency for best practices. Emerald has many Production Staff and Managers/Supervisors who have been with the Company for over 30 years. This will be their first opportunity to receive this type of classroom training.</p>
<i>Training Infrastructure and Administrative Plan</i>	<p>Emerald will designate one administrative employee to enroll trainees, collect rosters, track training hours, and meet with ETP staff. In addition, the Company's Operations Manager will oversee Manufacturing Skills training scheduling and delivery. All training will be conducted on-site and the plant in Union City, and at a nearby Community College. The Company is requesting a conservative amount of average training hours (34) and just two types of training toward streamlining administration.</p>

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

3. Sample Curriculum

Provided below is a summary of the methods by which training will be delivered including a sample of the courses that will be offered.

Each of the Trainee groups will be able to take courses under the various delivery methods.

Delivery Method	Classroom/Simulated Laboratory
Training Type/Level	Sample Classes
Business Skills	Communication Skills
	Team Building
Manufacturing Skills	Machine Operation and Maintenance
Delivery Method	Productive Laboratory (PL)
Training Type/Level	Sample Classes
Manufacturing Skills	Machine Operation and Maintenance

4. Additional Company or Training Project Details

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

4.1 Program Waivers

The next table lists the various waivers and supporting justifications for training that apply to this proposed Training Project.

Waivers/Justification Type	Summary
None have been requested	

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost
Development	None Identified		
Administrative	None Identified		
Training	Chabot Las Positas Community College District Additional training vendor to be determined.	Dublin, CA	TBD

4.3 Previous ETP Project Summary

The applicant has no previous ETP contracts.

4.4 Supporting Panel Proposal Documentation

Provided in Attachments 1, 2 and 3 is additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 1 – Group and Job Title Details

The proposed Training Project includes training for the following Trainees organized by training group.

Group #: 1 –Retrainees				
County		ETP Minimum Wage		
Alameda		\$17.63		
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post Retention Wage
<u>Alameda County</u>				
Machine Operator	186	\$15.30 - \$28.34	\$2.33	\$17.63
Mechanical and Maintenance Staff	11	\$22.70 - \$35.57	\$0.00	\$22.70
Production Manager	7	\$38.46 - \$49.14	\$0.00	\$38.46
Shipping Associate	13	\$18.63 - \$24.68	\$0.00	\$18.63
Supervisor	9	\$26.45 - \$30.00	\$0.00	\$26.45

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method</i>	<i>Classroom/Simulated Laboratory</i>
Training Type	Planned Course Offerings
Business Skills	Adapting to Change
Business Skills	Communication Skills
Business Skills	Conflict Management
Business Skills	Delegating/Directing/Motivating Employees
Business Skills	Essential Skills for New Supervisor
Business Skills	Leading Staff in Manufacturing
Business Skills	Performance Management & Succession Planning
Business Skills	Performance Review Introduction/Essentials
Business Skills	Setting and Meeting Goals
Business Skills	Setting SMART & Strategic Goals
Business Skills	Situational Leadership
Business Skills	Taking Individual Initiative
Business Skills	Team Building
Business Skills	Time Management
<i>Manufacturing Skills (ME) (Standard)</i>	
	Machine Operation and Maintenance

<i>Delivery Method</i>	<i>Productive Lab (PL)</i>
Training Type/	Sample Classes
<i>Manufacturing Skills (ME) (Standard)</i>	
	Machine Operation and Maintenance
<i>PL Justification</i>	
Need for Productive Laboratory Training	The primary focus of PL will be to train front-line managers, supervisors, leads and operators on recently purchased equipment. Training content will increase comprehension for improved machine maintenance to increase longevity, lower repair costs, reduce catastrophic failure, and increase up-time.
Equipment/Processes to be Used	Training materials and coursework will be developed by internal operations and in-house quality staff together with employees of the OEM. Coursework will be customized for each piece of equipment and the applicable manufacturing and maintenance processes.
Trainer Qualifications	Emerald will use subject matter experts from the OEM for PL training on the new machinery. Since the trainee population will include front line supervisors, this is a form of “train the trainers” for Emerald. The instructor will be dedicated to training delivery during all hours of PL training.

Attachment 3 - Training Project Characteristics

Provided in the table are details on the training characteristics.

Characteristic	Program Summary
Productive Lab (PL)	Trainees may produce goods for profit as a result of PL training. The trainer-to-trainee ratio cannot exceed 1:3, and maximum PL training hours per trainee are capped at 40, consistent with ETP guidelines.

TRAINING PROPOSAL FOR
Fuel Delivery Services, Inc.
17- 0636

Panel Meeting Date: 06/23/2017
Regional Office: Sacramento Regional Office
Analyst Name: Dongallo, Jesse
Type of Proposal: Single Employer Contract (SE)
Funding Source: Special Employment Training (SET)

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$247,680.00			
Program & Admin Cost	Support Cost	Substantial Contribution (\$ / %)	Total In-Kind
\$247,680.00	N/A	N/A	\$1,125,000.00

APPLICANT PROFILE

<i>Company Summary</i>	Fuel Delivery Services, Inc. (FDS), was founded in 1998 as a refined petroleum products specialty transport carrier. FDS is headquartered in Stockton, with additional terminals in Sacramento, San Jose, Petaluma, Benicia and Fresno.
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<i>Industry Sector(s)</i>	Transportation and Warehousing
<i>Priority Industry</i>	No
<i>No. of Employees (Applicant)</i>	State: <u>194</u> US: <u>194</u> World Wide: <u>194</u>
<i>Turnover Rate (Applicant)</i>	10.00%.
<i>Repeat Contractor</i>	No
<i>High Unemployment Area</i>	Yes
<i>Unions</i>	No

TRAINING PROFILE

Training Objective

FDS' mission is to provide the highest quality and safest fuel transportation services in the country, with a focus on exceptional customer service.

Training is summarized below. Additional details are provided 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 Hour
1	Retrainee Non - Priority Rate	184	\$15	68	\$1,020.00	8-200
2	Retrainee Job Creation Non - Priority Rate	25	\$20	120	\$2,400.00	8-200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details on the proposed Training Project.

1. Company Background

FDS is a refined petroleum products specialty carrier. The Company's main customer base are large chain gas and fueling station providers. The Company has additional terminals located in Sacramento, San Jose, Petaluma, Benicia, and Fresno, which are used as hubs for the local communities they service. The Company employees 194 professionals providing 24-hour dispatch service, 7 days a week, 365 days a year.

This will be FDS's first ETP Agreement. Training will take place at its Stockton headquarters facility only.

2. Current Training Project Details

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

<i>Purpose of Training</i>	<p>To support its mission of high-quality, safe fuel transportation, FDS has developed a comprehensive training plan for its Drivers and Mechanics.</p> <p>Driver training will focus on the latest techniques of fuel delivery considered to be the most efficient to meet client specifications. These industry-specific techniques will involve new vehicle systems, and upgrades to existing mechanical components. Training will also include skills related to client specific delivery and safety requirements for every destination.</p> <p>Mechanics require extensive training on the evolving software and upgrades for maintenance and repair purposes. The Mechanic's ability to troubleshoot through the application of the latest mechanical software is crucial in ensuring high quality, timely and safe service. FDS plans to upgrade its administrative software to provide more efficient routing maps, scheduling, customer service and industry topic information.</p> <p>Administrative Staff will also receive training.</p>
<i>Training Infrastructure and Administrative Plan</i>	<p>FDS designated a project manager and training coordinator to schedule training, record attendance, provide trainee enrollment data, verify training and retention completion, and participate in ETP monitoring.</p> <p>FDS has also retained an administrative consultant to assist with these administration tasks.</p>
<i>Marketing Plan</i> (MEC Only)	N/A
<i>Support Cost Description</i> (MEC Only)	N/A
<i>Substantial Contribution</i>	N/A

3. Sample Curriculum

Provided below is a summary of the methods by which training will be delivered including a sample of the courses that will be offered.

Each of the Trainee groups will be able to take courses under the various delivery methods.

Delivery Method	Classroom/Simulated Laboratory
Training Type/Level	Sample Classes
Commercial Skills	Equipment Operations & Maintenance
	Rail Transloading
	Fuel Handling & Delivery
Computer Skills	Communications Equipment
	Telapoint
	MS Office (Intermediate/Advanced)

4. Additional Company or Training Project Details

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

4.1 Program Waivers

The next table lists the various waivers and supporting justifications for training that apply to this proposed Training Project.

Waivers/Justification Type	Summary
HUA Wage	The 184 trainees in Group 1 work in a High Unemployment Area (HUA) county with unemployment exceeding the state average by 8.9% The wage may be modified to the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. The trainees in a HUA may receive more hours of basic or literacy skills training (Vocational English as a Second Language), as shown in the Curriculum.

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost
Development	Propel Consulting Group	El Dorado Hills	\$12,384
Administrative	Propel Consulting Group	El Dorado Hills	Not to exceed 10% of funding earned

4.3 Previous ETP Project Summary

Fuel Delivery Services does not have any active or previous ETP projects.

4.4 Supporting Panel Proposal Documentation

Provided in Attachments 1, 2 and 3 is additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this propose.

Attachment 1 – Group and Job Title Details

The proposed Training Project includes training for the following Trainees, organized by training group.

Group #: 1 – Retrainees	
County	ETP Minimum Wage
<i>San Joaquin (HUA)</i>	\$12.12

Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post-Retention Wage
<i>San Joaquin County</i>				
Administrative Staff	12	\$13.00 - \$26.00	\$0.00	\$13.00
Fuel Truck Driver	160	\$17.00 - \$30.00	\$0.00	\$17.00
Mechanic	12	\$18.00 - \$30.00	\$0.00	\$18.00

Group #: 2 Retrainees, Job Creation	
County	ETP Minimum Wage
<i>San Joaquin</i>	\$13.22

Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post-Retention Wage
Fuel Truck Driver	25	\$17.00 - \$30.00	\$0.00	\$17.00

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method</i>	<i>Classroom/Simulated Laboratory</i>
Training Type/Level	Planned Course Offerings
<i>Commercial Skills</i>	
	Billing
	Customer Collection
	Customer Service
	Tanker Hazardous Materials
	Spill/ Incident Response
	Terminal versus Refinery Loading and Unloading
	Equipment Operations & Maintenance
	Facility & Vehicle Delivery Safety Compliance
	Fuel Handling & Delivery
	Inventory Controls
	Labeling
	Loading & Unloading
	Placarding
	Product Knowledge
	Project Management
	Quality Assurance
	Rail Transloading
	Resource Planning
	Scheduling/Mapping
	Smith's System - Certification
	Storage
	Tank Refurbishing
	Tool Operation & Maintenance
	Vehicle Inspection
	Vehicle Repair & Maintenance
	Warehouse Oversight
<i>Computer Skills</i>	
	Truck "Blue Unit" Software Updates
	Truck "Blue Unit" Screen Updates
	Truck "Blue Unit" Initial Training
	People Net
	Forcaster
	TMW Batch
	Telapoint

Attachment 2 - Training Delivery and Curriculum Listing

<i>Delivery Method</i>	<i>Classroom/Simulated Laboratory</i>
Training Type/Level	Planned Course Offerings
	Communications Equipment
	MS Office (Intermediate/Advanced)

Attachment 3 - Training Project Characteristics Details

Provided in the table are details on the training characteristics.

Characteristic	Program Summary
Retrainee - Job Creation	<p>Due to the increase in demand for their services, FDS has committed to hiring 25 employees to support the addition of 8 delivery trucks to the existing fleet. Each delivery unit will require approximately 6 new drivers for rotational delivery operation throughout the week. With the addition of net new staff, FDS will incorporate an extensive 6 to 8-week training plan to cover industry specific techniques, additional equipment, software and technology ensuring the highest quality fuel delivery service.</p> <p>The Panel incentivizes job creation. Training for newly-hired employees is reimbursed at a higher rate, and trainees are subject to a lower post-retention wage. The date of hire for trainees is within the three-month period before contract approval, or within the term of the contract. Trainees are hired into “net new jobs” as a condition of contract. Substantial Contribution and Turnover Rate penalty requirements do not apply. Employer must demonstrate expanded or new facilities, new equipment or machinery, expanded business capacity or other measureable investment in hiring workers and expanding their California workforce. A trainee whose employment is “Temp-to-Permanent”, “seasonal”, or “part-time” may be considered newly-hired, but employment retention cannot begin until trainee is a permanent full-time employee on Contractor payroll.</p>



**TRAINING PROPOSAL FOR
GRANDCARE HEALTH SERVICES LLC
17- 0524**

Panel Meeting Date: 05/25/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Wadzinski, Elsa
Type of Proposal: Single Employer Contract (SE)
Funding Source: SET

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: Total ETP Funding \$228,836.00			
Program & Admin Cost	Support Cost	Substantial Contribution (\$ / %)	Total In-Kind
\$228,836.00	N/A	N/A	\$336,146.50

APPLICANT PROFILE

Company Summary	GrandCare Health Services LLC (GrandCare) provides home health care, palliative services, and caregiving services to individuals with serious illnesses, homebound individuals, as well as families that need respite care.
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Industry Sector(s)	Healthcare		
Priority Industry	Yes		
No. of Employees (Applicant)	State: 389	US: 389	World Wide: 389
Turnover Rate (Applicant)	5%		
Repeat Contractor	No		
High Unemployment Area	No		
Unions	N/A		

TRAINING PROFILE

<i>Training Objective</i>	Provide skill development training to acquire industry recognized knowledge. Provide clinical Medical Skills training (both Preceptor and Didactic), and abilities that are transferable within the home healthcare industries. Other training includes Continuous Improvement, Computer Skills, and HAZMAT.
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Training is summarized below. Additional details are provided in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# of Trainees	Reimbursement Rate	Avg. Hours	Cost Per Trainee	Min – Max Hour
1	SET Retrainees	133	\$18	74	\$1,332	8 - 200
2	SET Retrainee – Job Creation	17	\$20	152	\$3,040	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details on the proposed Training Project.

1. Company Background

GrandCare Health Services LLC (GrandCare) (www.grandcarehealth.com) provides home nursing, rehabilitative care, and therapeutic services. GrandCare is accredited by The Joint Commission and licensed by the California Department of Public Health. GrandCare was founded in 2003 and is headquartered in Pasadena. This training will be funded under ETP's Special Employment Training (SET) provisions for companies that do not have out-of-state competition and also qualifies as a priority industry.

2. Current Training Project Details

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

<i>Purpose of Training</i>	<p>To be competitive in the in-home healthcare industry, GrandCare must ensure its employees competency to provide care to its customers. With a limited pipeline of workers in a growing industry, GrandCare needs to provide quality diverse services that meet both the clients' needs and local/national regulations. GrandCare employees and new hires require training in medical skills, computer skills and continuous improvement to diminish skill gaps, develop new skills, keep current on industry needs/demands, learn new practices and earn designations.</p> <p>GrandCare is expanding its workforce to support a growing customer base in Orange County. The Company plans to hire 17 employees outlined in Job Number 2, to support the increase in this customer base.</p> <p>The Panel has established a higher reimbursement rate of \$22 per hour for nurse upgrade training, recognizing the higher cost of delivery for the Clinical Preceptor and Didactic models.</p>
<i>Training Infrastructure and Administrative Plan</i>	<p>Training will begin upon Panel approval, and will be delivered at the Los Angeles and San Diego County facilities, and at trainee worksites. GrandCare will utilize qualified in-house trainers and vendors (if needed) to conduct training. The Director of Patient Care Services will oversee the program, schedule training, maintain rosters from each class and worksite trainer, and coordinate with the administrative vendor. The Company has retained Economic Incentives Advisory Group to provide administrative support and recordkeeping throughout the term.</p>
<i>Marketing Plan</i> (MEC Only)	N/A
<i>Support Cost Description</i> (MEC Only)	N/A
<i>Substantial Contribution Description</i>	N/A

3. Sample Curriculum

Provided below is a summary of the methods by which training will be delivered including a sample of the courses that will be offered.

Each of the Trainee groups will be able to take courses under the various delivery methods.

Delivery Method	Classroom/Simulated Laboratory
Training Type/Level	Sample Classes
Computer Skills	Patient Billing and Accounts Receivable (PBAR)
	DeVero Electronic Medical Records
Continuous Improvement Skills	Quality Improvement
	Team Building
Hazardous Materials Skills	Sharps Disposal
	Biohazards
Medical Skills (Didactic)	Basic Life Support
	Dementia Care
Medical Skills (Preceptor)	Patient Assessment and Care
	Occupational Therapy Skills

4. Additional Company or Training Project Details

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

4.1 Program Waivers

The next table lists the various waivers and supporting justifications for training that apply to this proposed Training Project.

Waivers/Justification Type	Summary
Modified Retention for Allied Healthcare	Healthcare workers are considered non-customary workers. For this, they are allowed to modify the definition of full-time employment from 35 hours in a 90-day period to 30 hours in a 90-day period. Additionally, these workers may use an alternate retention (500 hours within 272 days with one employer) to satisfy the retention requirement.

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost
Development	Economic Incentives Advisory Group	Phoenix, AZ	\$11,305.10
Administrative	Economic Incentives Advisory Group	Phoenix, AZ	\$20,349.18
Training	None to Date		

4.3 Previous ETP Project Summary

The applicant has no previous ETP contracts.

4.4 Supporting Panel Proposal Documentation

Attachments 1, 2 and 3 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 1 – Group and Job Title Details

The proposed Training Project is for the following Trainees, organized by group.

Group #: 1 – Retrainees				
County		ETP Minimum Wage		
Los Angeles		\$16.96		
San Diego		\$16.72		
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post Retention Wage
Los Angeles County				
Licensed Vocational Nurse (LVN)	3	\$30.00 - \$35.00	\$0.00	\$30.00
Registered Nurse (RN)	2	\$40.00 - \$60.00	\$0.00	\$40.00
Strategic Physician Specialist	1	\$26.04 - \$30.00	\$0.00	\$26.04
Staffing Administrator	1	\$20.40 - \$20.40	\$1.64	\$22.04
Case Manager / Coordinator	5	\$19.53 - \$23.44	\$0.00	\$22.04
Client / Patient Relations	6	\$16.93 - \$19.53	\$2.51	\$22.04
Clinical Coordinator / Educator	2	\$26.44 - \$32.55	\$0.00	\$26.44
Finance	8	\$18.50 - \$26.04	\$0.00	\$22.04
Occupational Therapist	3	\$40.00 - \$40.00	\$0.00	\$40.00
Physical Therapist (PT) 1	15	\$30.00 - \$46.15	\$0.00	\$30.00
Physical Therapist (PT) 2	8	\$80.00 - \$90.00	\$0.00	\$80.00
Physical Therapist (PT) Assistant	5	\$30.00 - \$40.00	\$0.00	\$30.00
Office Clerical	3	\$17.00 - \$21.50	\$0.54	\$22.04
Licensed Vocational Nurse (LVN)	17	\$25.00 - \$30.00	\$0.00	\$25.00
Quality Assurance	3	\$21.61 - \$33.00	\$0.00	\$22.04
Registered Nurse (RN)	19	\$22.13 - \$50.00	\$0.00	\$22.13
Social Worker	1	\$40.00 - \$40.00	\$0.00	\$40.00
San Diego County				
Case Manager / Coordinator	2	\$20.12 - \$20.83	\$1.21	\$22.04
Client Relations	4	\$16.93 - \$19.53	\$2.51	\$22.04

Attachment 1 – Group and Job Title Details

Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post Retention Wage
Office Clerical	3	\$18.00 - \$19.00	\$3.04	\$22.04
Licensed Vocational Nurse (LVN)	5	\$30.00 - \$35.00	\$0.00	\$30.00
Social Worker	3	\$40.00 - \$60.00	\$0.00	\$40.00
Quality Assurance	3	\$24.74 - \$32.00	\$0.00	\$24.74
Registered Nurse (RN)	11	\$30.00 - \$40.00	\$0.00	\$30.00

Group #: 2 Retraitees, Job Creation

County	ETP Minimum Wage
Los Angeles	\$14.13
San Diego	\$13.94

Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post Retention Wage
Los Angeles County				
Case Manager	3	\$19.53 - \$20.00	\$0.00	\$19.53
Care Manager	1	\$19.53 - \$20.00	\$0.00	\$19.53
HR Assistant	1	\$16.93 - \$18.50	\$0.00	\$16.93
Patient Relations	2	\$16.93 - \$19.53	\$0.00	\$16.93
Registered Nurse (RN)	1	\$19.53 - \$40.00	\$0.00	\$19.53
Quality Assurance	1	\$21.61 - \$33.00	\$0.00	\$21.61
Licensed Vocational Nurse (LVN)	2	\$25.00 - \$30.00	\$0.00	\$25.00
Physical Therapist (PT) Assistant	2	\$30.00 - \$40.00	\$0.00	\$30.00
San Diego County				
Licensed Vocational Nurse (LVN)	2	\$30.00 - \$35.00	\$0.00	\$30.00
Case Manager	2	\$19.53 - \$20.00	\$0.00	\$19.53

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method</i>	<i>Classroom/Simulated Laboratory</i>
Training Type	Planned Course Offerings
<i>Computer Skills</i>	
	Additional Documentation Review (ADR)
	Clinical Service Management Systems
	DeVero Electronic Medical Records
	DeVero Modules
	Great Plains
	Microsoft Office Suite
	OASIS C 2 Documentation
	Patient Billing and Accounts Receivable (PBAR)
	Playmaker
	Strategic Healthcare Programs (SHP)
	Tiger Text Clinical Solutions
<i>Continuous Improvement Skills</i>	
	Clinical Documentation
	Communication Skills
	Coordination of Care
	Customer Service
	Home Health Comparable
	Home Health Patient Satisfaction Survey
	ICD-10 Coding
	Interdisciplinary Team Process
	Problem Solving
	Quality Improvement
	Team Building
<i>Hazardous Materials Skills</i>	
	Biohazards
	Environmental Safety
	Hand Washing
	Home Safety
	Isolation Precautions
	Personal Protective Equipment (PPE)
	Sharps Disposal
	Spills

Attachment 2 - Training Delivery and Curriculum Listing

<i>Delivery Method</i>	<i>Classroom/Simulated Laboratory</i>
Training Type	Planned Course Offerings
<i>Medical Skills (didactic)</i>	
	Advanced Cardiac Life Support (ACLS)
	Annual Skills Update
	Arterial Blood Gas (ABG) Interpretation
	Assessing Cardiac Changes
	Assessing Respiratory Function
	Back Injury Prevention
	Basic Life Support (BLS)
	Behavior Management
	Body Mechanics
	Cardiac Conditions
	Care of the Pleurx Patient
	Central Venous Access Devices
	Dementia Care
	Diabetic Management
	Disaster and Emergency Preparedness
	Electrolyte Imbalance
	External Feeding Tube Management
	Equipment Skills
	Fall Risk Assessment
	Functional Mobility and Ambulance
	Gastrointestinal Assessment and Management
	Home Health Aide (HHA) Competencies
	Incontinence Management
	Infection Control
	Infusion Therapy (IVIG) Treatment
	Intravenous (IV) Therapy
	Medication and Administration Management
	Neurological Conditions
	Occupational Therapy Skills
	Orthopedic Conditions
	Pain Management (Acute and Chronic)
	Patient Assessment and Care
	Patient Fall Prevention
	Patient Transfer Techniques
	Physical Therapy Skills
	Point-of-Care Laboratory Testing
	Reduction in Hospital Readmission

Attachment 2 - Training Delivery and Curriculum Listing

<i>Delivery Method</i>	<i>Classroom/Simulated Laboratory</i>
Training Type	Planned Course Offerings
	Rehabilitation Skills
	Safe Medical Transport
	Sharps Disposal
	Speech Therapy Skills
	Tracheotomy Care
	Urinary Management (Foley Catheter, Input/Output)
	Wound Management
	Wound Vac Therapy
<i>Delivery Method</i>	<i>Productive Laboratory</i>
Training Type	Planned Course Offerings
<i>Medical Skills (preceptor)</i>	
	Adequate Nutrition and Fluid Intake
	Body Functioning
	Body Mechanics
	Emergency Procedures
	Environment Maintenance
	Functional Mobility and Ambulation
	Infection Control
	Medication Management (PT/OT/Speech)
	Neurological Conditions
	Normal Range of Motion and Positioning
	Occupational Therapy Skills
	Orthopedic Conditions
	Patient Assessment and Care
	Patient Assessment and Care
	Personal Hygiene and Grooming
	Physical Therapy Skills
	Rehabilitation Skills
	Safe Transfer Techniques and Ambulation
	Speech Therapy Skills
	Vitals
	Working with Population served by HHA

Attachment 3 - Training Project Characteristics Details

The proposed Training Project includes training for the following Trainees, organized by training group.

Characteristic	Program Summary
None	Standard retrainee program with no additional characteristics.



Training Proposal for:
Kinecta Federal Credit Union
Agreement Number: ET18-0103

Panel Meeting of: June 23, 2017

ETP Regional Office: North Hollywood

Analyst: M. Webb

PROJECT PROFILE

Contract Attributes:	Retrainee SET	Industry Sector(s):	Financial Services Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
Counties Served:	Los Angeles	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
Number of Employees in:	CA: 875	U.S.: 886	Worldwide: 886	
Turnover Rate:	19%			
Managers/Supervisors: (% of total trainees)	18%	See Waiver		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$219,240		\$0	\$0		\$219,240

In-Kind Contribution:	100% of Total ETP Funding Required	\$648,847
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET	Business Skills, Continuous Improvement, Management Skills	406	8-200	0-61	\$540	\$29.38
				Weighted Avg: 36			

Minimum Wage by County: \$29.38 per hour for Statewide Average Wage (SET)

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

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

Up to \$3.48 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Accountant/Analyst	\$31.73-\$49.64	11
IT Staff I	\$26.83-\$56.83	41
IT Staff II	\$56.84-\$73.18	20
Lending Staff I	\$25.90-\$55.90	65
Lending Staff II	\$55.91-\$85.90	34
Lending Staff III	\$85.91-\$115.91	10
Lending Staff IIII	\$115.92-\$145.91	10
Wealth Advisor/Staff I	\$28.07-\$58.07	10
Wealth Advisor/Staff II	\$59.07-\$89.07	5
Wealth Advisor/Staff III	\$89.08-\$119.07	5
Member Service Staff	\$25.87-\$56.71	69
Frontline Manager	\$28.85-\$64.78	24
Non-Mortgage Insurance Staff	\$28.02-\$45.16	9
Collections/Servicing Staff	\$26.60-\$49.82	25
Compliance/Risk/Legal Staff I	\$26.52-\$56.52	20
Compliance/Risk/Legal Staff II	\$56.53-\$74.30	6
Support Staff I	\$26.51-\$56.51	32
Support Staff II	\$56.52-\$80.00	10

INTRODUCTION

Founded in 1940, Kinecta Federal Credit Union (KFCU) (www.kinecta.org), provides financial and business services as follows: checking and savings accounts, auto, business, home, real estate loans, personal loans and insurance services. This will be the Company's first ETP Agreement.

The financial industry continually faces changes to its model of operations. This includes new regulatory requirements; product and service upgrades; systems (lending origination), efficiency methods and sales initiatives.

PROJECT DETAILS

To remain current, KFCU has purchased a new Lending Origination System, and developed a training plan to improve skill sets and increase productivity. Training will include curriculum on federal mandates such as the Consumer Protection Act and the Military Lending Act. Training will also ensure staff can navigate computer software, and assist customers with cloud lending solutions.

Training Plan

Business Skills (40%): Training will be delivered to all occupations to introduce new products and services being offered through KFCU. Training provided will increase employee skills in business writing, accounting, and communication skills.

Management Skills (20%): Training will be delivered to Managers/Supervisors to increase leadership and coaching skills. Leaders of KFCU will learn new coaching models to encourage frontline workers and the proper way to introduce change to staff (new systems, systems, products, etc.).

Continuous Improvement (10%): Training will be delivered to all occupations to increase productivity and efficiency. Topics include Conflict Resolution, Accountability, and Time Management.

Computer-Based Training (30%): Trainees will receive job-specific training on consumer lending, investments and insurance, analyzation, business grammar, and presentation skills.

Commitment to Training

KFCU spends approximately \$200,000 annually on training at each location. Training delivered include job specific courses in Business Skills, Continuous Improvement, Workplace Violence Prevention, and Management Skills.

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

➤ Training Infrastructure

The First Vice President of Human Resources will administer this training project. Staff will educate company Managers/Supervisors, and instructors on ETP rules and regulation to ensure employees are aware of documentation procedures, retention, and wage requirements. KFCU will utilize a Learning Management System to document training over the course of the Agreement.

Frontline Managers

KFCU is requesting to include 24 Managers in this training proposal. These employees supervise and work with Support, Collections, Lending, and Compliance Staff. These Managers spend more than 50% of their time performing frontline work duties. As such, they meet the Panel's definition of "frontline workers" and qualify for Special Employment Training (SET) funding.

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 (\$29.38 per hour) at the end of the retention period.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

N/A

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

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- Account Updates and Maintenance
- Business Account Training
- Business Writing Workshop
- Consumer Lending Training
- Five Choices for Extraordinary Productivity
- Member Service Basics
- MLC New Hire Workshop
- Multi-Generational Communication
- PFA Advanced
- PFA Basics
- Presentation Skills
- Quest Quality Service
- TKX Essentials
- TKX Referrals: The Value Exchange
- Trusted Advisor
- Working at the Speed of Trust (Staff)

CONTINUOUS IMPROVEMENT

- Activating Change - Staff Edition
- Conflict Resolution
- DISC Styles and Communication
- Seven Habits of Highly Effective People
- Six Thinking Hats
- The Oz Principle - Steps to Accountability
- Time Management

MANAGEMENT SKILLS

- Activating Change - Managers Edition
- Leader as Coach
- Leading at the Speed of Trust (Management)
- Situational Leadership
- TKX Coaching Model

CBT Hours

0-61

BUSINESS SKILLS

- Account Ownership Requirements and Limitations (Basic) (2017) (0.5 hours)
- Account Ownership Requirements and Limitations Advanced (2017) (0.5 hours)
- Achieve Successful Results (0.5 hours)
- Ancillary Products 1 (2017) (0.5 hours)
- Ancillary Products 2 (2017) (0.5 hours)
- BSA Advanced for Lending (2017) (0.5 hours)

- BSA Advanced for MSC,MCC, & Operations (2017) (0.5 hours)
- BSA and OFAC General (2017) (0.5 hours)
- BSA General for Nix (2017) (0.5 hours)
- Business Continuity Program (2017) (0.5 hours)
- Business Ethics (2017) (0.5 hours)
- Business Products and Services (0.5 hours)
- Check Fraud Prevention (2017) (0.5 hours)
- Checking Accounts (0.5 hours)
- Consumer Lending Basics 1 (2016) (0.5 hours)
- Consumer Lending Basics 2 (2016) (0.5 hours)
- Consumer Lending Basics 3 (2016) (0.5 hours)
- Consumer Lending Basics 4 (2016) (0.5 hours)
- Consumer Lending Products (0.5 hours)
- Convenience Products and Services (0.5 hours)
- Credit Card Conversion (0.5 hours)
- Credit Cards (0.5 hours)
- Credit Union Overview (2017) (0.5 hours)
- Deliver Simple Solutions (0.5 hours)
- Detecting and Preventing Mortgage Loan Fraud (2017) (0.5 hours)
- Earn Trust (0.5 hours)
- ECOA and Reg B (2017) (0.5 hours)
- Elder and Dependent Adult Financial Abuse (2017) (0.5 hours)
- Fair Debt Collection Practices Act (FDCPA) (2016) (0.5 hours)
- Fair Lending (2017) (0.5 hours)
- FCRA,SCRA,FDCPA (2017) (0.5 hours)
- FHA Streamline Refinance Product Training (2017) (0.5 hours)
- Identity Theft and Fact Act (2017) (0.5 hours)
- Individual Retirement Accounts (0.5 hours)
- Information Security Program (2017) (0.5 hours)
- Inside Kinecta (0.5 hours)
- Investments and Insurance (0.5 hours)
- Kinecta Credit Cards (2016) (0.5 hours)
- Kinecta Federal Credit Union (2017) (0.5 hours)
- Know Our Business (0.5 hours)
- Medallion Signature Guarantee (2016) (0.5 hours)
- Military Lending Act (2017) (0.5 hours)
- MLO Training (2017) (0.5 hours)
- MoneyGram Fraud Prevention (2017) (0.5 hours)
- NCUSIF Share Insurance (2017) (0.5 hours)
- NIX Products and Services (0.5 hours)
- Overdraft Protection Overview (0.5 hours)
- Privacy Training (2017) (0.5 hours)
- Project Management Basics (0.5 hours)
- Real Estate Loans (0.5 hours)
- Reg CC (2017) (0.5 hours)
- Regulation D (2017) (0.5 hours)
- Robbery Preparedness for Kinecta (2017) (0.5 hours)
- Robbery Prevention for Nix Neighborhood Lending (2017) (0.5 hours)
- Savings Accounts(0.5 hours)
- Social Engineering (2017) (0.5 hours)
- Telephone Consumer Protection Act (2017) (0.5 hours)
- Tellerly (0.5 hours)
- TILA-RESPA (2017) (0.5 hours)

- TISA (2017) (0.5 hours)
- Using Social Media: A Guide for Kinecta Employees (2017) (0.5 hours)
- VPN Multi Factor Authentication – NH (0.5 hours)
- Workplace Violence Prevention (2017) (0.5 hours)
- Basic Presentation Skills: Creating a Presentation (0.5 hours)
- Basic Presentation Skills: Delivering a Presentation (0.5 hours)
- Being an Effective Team Member (0.5 hours)
- Building Trust (0.5 hours)
- Business Grammar: Common Usage Errors (0.5 hours)
- Business Grammar: Sentence Construction (0.5 hours)
- Business Grammar: The Mechanics of Writing (0.5 hours)
- Business Grammar: Working with Words (0.5 hours)
- Business Writing: How to Write Clearly and Concisely (0.5 hours)
- Business Writing: Know Your Readers and Your Purpose (0.5 hours)
- Communicating Across Cultures (0.5 hours)
- Decision Making: The Fundamentals (0.5 hours)
- Delivering a Difficult Message with Diplomacy and Tact (0.5 hours)
- Diversity on the Job: Diversity and You (0.5 hours)
- Interpersonal Communication: Communicating with Confidence (0.5 hours)
- Interpersonal Communication: Listening Essentials (0.5 hours)
- Interpersonal Communication: Targeting Your Message (0.5 hours)
- Optimizing Your Work/Life Balance: Maintaining Your Life Balance (0.5 hours)
- Principles of Accounting and Finance for Non-financial Professionals (0.5 hours)
- Strategies for Communicating with Tact and Diplomacy (0.5 hours)
- Time Management: Planning and Prioritizing Your Time (0.5 hours)
- Using E-mail and Instant Messaging Effectively (0.5 hours)

COMPUTER SKILLS

- Analyzing Data with What-if Analysis (0.5 hours)
- Applying Basic Data Formatting in Excel 2010 (0.5 hours)
- Automating Excel Tasks using Macros (0.5 hours)
- Getting Started with Excel 2010 (0.5 hours)
- Getting Started with Outlook 2010 (0.5 hours)
- Getting Started with PowerPoint 2010 (0.5 hours)
- Getting Started with Word 2010 (0.5 hours)
- Introduction to Project Management using Project 2010 (0.5 hours)
- Managing Attachments, Graphics, Signatures, and Autoreplies in Outlook 2010 (0.5 hours)
- Manipulating Formulas and Using Forms in Excel 2010 (0.5 hours)
- Moving and Getting Around in Excel 2010 (0.5 hours)
- Moving Around in Word 2010 (0.5 hours)
- Office 2010 New Core Features (0.5 hours)
- PivotTable Filters, Calculations, and PowerPivot (0.5 hours)
- Using Basic Formulas in Excel 2010 (0.5 hours)
- Using Basic Functions with Excel 2010 (0.5 hours)
- Using Lookup, Reference, Math, and Text Functions in Excel 2010 (0.5 hours)
- Word 2010, Excel 2010, and the New Office 2010 Interface (0.5 hours)

MANAGEMENT SKILLS

- Business Coaching: Conducting Coaching Sessions (0.5 hours)
- Engaging Top Performers (0.5 hours)
- Essential Mentoring Techniques: Mentoring Fundamentals (0.5 hours)
- First Time Manager: Challenges (0.5 hours)
- First Time Manager: Meeting Expectations (0.5 hours)
- First Time Manager: Understanding a Manager's Role (0.5 hours)
- Leadership Essentials: Building Your Influence as a Leader (0.5 hours)
- Leadership Essentials: Communicating Vision (0.5 hours)
- Leadership Essentials: Leading Business Execution (0.5 hours)
- Leadership Essentials: Leading Change (0.5 hours)
- Leadership Essentials: Motivating Employees (0.5 hours)
- Leading Teams: Building Trust and Commitment (0.5 hours)
- Leading Teams: Dealing with Conflict (0.5 hours)
- Leading Teams: Establishing Goals, Roles, and Guidelines (0.5 hours)
- Management Essentials: Delegating (0.5 hours)
- Management Essentials: Developing Your Direct Reports (0.5 hours)
- Management Essentials: Treating Your Direct Reports Fairly (0.5 hours)
- Managing Workforce Generations: Introduction to Cross-generational Employees (0.5 hours)
- Managing Workforce Generations: Working with a Multigenerational Team (0.5 hours)

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



Training Proposal for:

LZB Manufacturing, Inc. dba La-Z-Boy

Agreement Number: ET18-0104

Panel Meeting of: June 23, 2017

ETP Regional Office: North Hollywood

Analyst: M. Webb

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Counties Served:	San Bernardino	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
Number of Employees in:	CA: 555	U.S.: 8,000	Worldwide: 8,000	
Turnover Rate:	19%			
Managers/Supervisors: (% of total trainees)	6%			

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$128,880		\$19,332 15%	\$0		\$109,548

In-Kind Contribution:	100% of Total ETP Funding Required	\$130,000
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Comm'l. Skills, Computer Skills, Cont. Imp., Mfg. Skills, OSHA 10/30, PL-Mfg. Skills, PL-Comm'l. Skills	358	8-200	0	\$360	*\$16.16
				Weighted Avg: 20			

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

Minimum Wage by County: Job Number 1: \$16.16 per hour for San Bernardino County.

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

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

Up to \$3.86 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Administration Staff	\$15.61-\$22.59	8
Support Staff	\$12.30-\$26.73	118
Production Staff (Assemblers/Poly Cutter/Framer/Upholstery/Stuffer/Floater)	\$12.30-\$22.80	208
Managers/Supervisors	\$22.84-\$51.44	24

INTRODUCTION

Founded in 1919 and located in Redlands, LZB Manufacturing, Inc. dba La-Z-Boy (LZB) is a furniture manufacture. LZB has manufacturing plants across North America and is considered the largest manufacturer of upholstered furniture. The Redlands location is the only manufacturing facility in California. This is the Company's second ETP Agreement.

Since the last ETP Agreement, LZB has implemented new methodologies in Lean manufacturing and business solutions such as A3 thinking, PDCS Cycles and Practical Problem Solving. LZB staff has revised their production process and determined better ways to eliminate waste and improve job performance. Training provided under this Agreement will build on previous course topics and incorporate updated methods and processes that will further Lean manufacturing and efficiency. No duplicate training will take place under this project.

PROJECT DETAILS

The furniture industry has continued to struggle in the United States due to increased overseas competition. With lower cost structures and efficient distribution, overseas manufacturers have forced U.S. retailers to source goods offshore. To remain competitive, LZB has continued to revise and improve company production processes to increase performance.

Waste elimination is the most important contributor in establishing a Lean manufacturing environment. New Lean methods will be implemented to increase efficiency and reduce cost-per-unit. Trainees will participate in courses such as Kaizen, Single Piece Flow and 5S to eliminate waste in the production process.

Training will also increase opportunity for advancement, and drive higher quality output, with coursework in Continuous Improvement, Business and Computer Skills. Training topics include Product Development, Quality Expectations/Improvement, Team Building, Enterprise Resource Planning, Customer Service and Environmental Process Change.

Training Plan

Training will be delivered by in-house subject matter experts. Training has been scheduled to begin Summer 2017 for all departments.

Business Skills (15%): Training will be offered to all occupations to improve communication, time management and leadership skills. Courses include Effective Communications, Scheduling and Messaging, Quality Improvement and Business Support Best Practices.

Commercial Skills (10%): Training will be offered to Production Staff to increase knowledge on basic electrical methods. Staff will learn how to properly maintain and use electrical tools and equipment to manufacture LZB furniture.

Computer Skills (5%): Training will be offered to all occupations to ensure all staff can utilize internal computer software programs and improve usage of programs such as Microsoft Office.

Manufacturing Skills (20%): Training will be offered to Production Staff and Managers/Supervisors to improve production processes and systems. Trainees will learn how to properly operate company equipment and implement new cellular manufacturing methods.

Continuous Improvement (40%): Training will be offered to all occupations to increase efficiencies and implement Lean manufacturing skills in the production processes. Training includes Root Cause Analysis, Six Sigma, Lean Manufacturing and Seven Deadly Wastes

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

Productive Laboratory

The Panel recently adopted regulations to authorize reimbursement for training delivered in a Productive Laboratory (PL) setting. PL trainees may produce goods for profit as part of the training in the courses identified under the Curriculum. The instructor must be dedicated to training delivery during all hours of training.

LZB has identified 60 Production Staff that require PL training on cellular manufacturing in the production process to ensure proper floating, balancing, single piece flow and quality. PL training will also be delivered in Commercial Skills to learn basic electrical skill sets. Workers will receive cross-training to become efficient in all areas of the process, to cover various shifts when needed. PL training will be delivered at a ratio of 1:1. Trainees may receive up to 40 hours of training. Once staff has participated in lecture-based training led by qualified instructors (in-house), workers will be assigned to complete tasks while operating equipment and upholstering furniture. Instructors will guide workers through the process and provide evaluations to ensure staff is able to run equipment independently.

Commitment to Training

LZB spends approximately \$12,000 annually on training in CA. Training provided includes product quality, supervisor development and safety training. Training delivered to staff is job-specific and companywide.

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

➤ Training Infrastructure

The HR Manager and LZB receptionist will oversee all administrative duties for this training project. Staff will meet with ETP staff, complete data entry tasks such as enrollment, and tracking training hours. Staff has met with LZB management to schedule training and will disperse and collect rosters for ETP record keeping.

Substantial Contribution

LZB is a repeat contractor with payment earned in excess of \$250,000 at the Redlands facility within the past five years. (See Prior Project Table.) Accordingly, reimbursement for trainees at the Redlands facility will be reduced by 15% to reflect the Company's \$19,332 Substantial Contribution to the cost of training.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET12-0342	Redlands	04/02/12- 04/01/14	\$438,930	\$438,930 (100%)

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

- Effective Communications
- Management Training
- Scheduling and Messaging
- Business Support Best Practices
- KRONOS Best Practices
- Leadership Development
- Time Management
- Supervisor Development Training Program

COMMERCIAL SKILLS

- Basic Electrical

COMPUTER SKILLS

- Enterprise Resource Planning
- Basic Microsoft Windows and Microsoft Office
- PLC Training
- Sigma Nest W

CONTINUOUS IMPROVEMENT

- PDCA
- Quality Improvement
- Team Building
- Equipment Adjustments
- Lean Manufacturing/Lean Manufacturing Culture
- Lean Simulation Exercise
- Quality Expectations
- Seven Deadly Wastes
- 5S Training
- Practical Problem Solving
- A3 Thinking
- Kaizen
- Root Cause Analysis
- 5 Whys
- Product Development
- Customer Service
- Total Product Maintenance
- Project Management
- Decision Analysis
- Potential Problem/Opportunity Analysis
- Environmental Process Change
- Cross-Training Primary/Secondary Skills
- Six Sigma

MANUFACTURING SKILLS

- Equipment Maintenance Skills
- Cellular Manufacturing
- La-Z-Boy Production System

OSHA 10/30 (Certified OSHA Instructor)

- OSHA 10 (requires completion of 10 hrs)
- OSHA 30 (requires completion of 30 hrs)
- OSHA Cal (requires completion of 30 hrs)

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

Productive Lab Hours (Ratio 1:1)

0-40

COMMERCIAL SKILLS

- Basic Electrical

MANUFACTURING SKILLS

- Equipment Maintenance Skills
- Cellular Manufacturing
- La-Z-Boy Production System

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



TRAINING PROPOSAL FOR
McWane, Inc.
17-0661

Panel Meeting Date: 06/23/2017
Regional Office: Bay Area Regional Office
Analyst Name: Molinar, Luke
Type of Proposal: Single Employer Contract (SE)
Funding Source: Out-of-State Competition (OSC)

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$194,326.00			
Program & Admin Cost	Support Cost	Substantial Contribution	Total In-Kind
\$194,326.00	N/A	N/A	\$250,000.00

APPLICANT PROFILE

Company Summary	McWane, Inc. (McWane) produces ductile iron products including pipe, valves, hydrants, fittings and plumbing products.		
Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. of Employees (Applicant)	State: <u>418</u>	US: <u>4,671</u>	World Wide: <u>4,671</u>
Turnover Rate (Applicant)	8.40%		
Repeat Contractor	No		
High Unemployment Area	No		
Unions	Glass, Molders, Pottery, Plastics and Allied Workers International Union Local 164-B		

TRAINING PROFILE

Training Objective	McWane has many long-time employees that will be retiring in the Company over the next few years. The remaining workforce must be trained and skilled sufficiently to assume leadership roles.
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Training is summarized below. Additional details are provided in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# of Trainees	Reimbursement Rate	Avg. Hours	Cost Per Trainee	Min – Max Hour
1	Retraitees	253	\$18.00	39	\$702.00	8 - 200
2	Veteran Retraitees	19	\$22.00	40	\$880.00	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details on the proposed Training Project.

1. Company Background

Founded in 1903, McWane is a family-operated company that manufactures pipes, valves, hydrants, fittings and plumbing products. Training will also be delivered to McWane's subsidiary companies, AB&I, a division of McWane, Inc. (AB&I) and Anaco, a division of McWane, Inc. (Anaco) AB&I manufactures cast iron pipes and fittings at its Oakland facility, and ships products from its distribution center in the City of Industry. Anaco manufactures no-hub stainless steel couplings at its Corona facility. McWane products are used in a variety of infrastructure projects, including hotels, stadiums, hospitals, schools, and were even used at Alcatraz.

2. Current Training Project Details

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

<i>Purpose of Training</i>	<p>McWane has many long time employees retiring over the next few years. These employees have institutional knowledge and hold leadership positions. McWane is requesting ETP assistance to train the next generation of employees to assume leadership roles. In addition, Production Workers advancing to leadership positions must be trained in math, literacy, and computer training.</p> <p>McWane will provide training on new manufacturing processes. Workers will receive training on a new Enterprise Resource Planning (ERP) system to better track customer requests and purchases, material orders and inventory. Training will include Six Sigma, Lean manufacturing and Quality Control tools.</p> <p>McWane will also provide training on new technology. The Company developed a new coating system for its pipes which reduces odor and fume leakage. This coating is currently in the testing phase, and workers require training for production stage. McWane recently added the "no-bake" molding, which uses chemical resins to bind together the sand used in molding, allowing the Company to produce larger castings. Workers need training to properly use the advanced chemicals and produce the new and larger products.</p> <p>McWane also utilizes a large manufacturing robot for grinding large pipes. Employees need training to properly program and operate it.</p>
<i>Training Infrastructure and Administrative Plan</i>	<p>Training will be provided by subject matter experts and training vendors. Classes will be conducted at the Company's facilities in Corona, Oakland and City of Industry. Classes may be delivered as E-learning to allow training to be delivered to trainees at multiple facilities. This training will be delivered at the 1:20 trainer-to-trainee ratio.</p> <p>Director of Business Operations will oversee all ETP training. This includes scheduling training at the Oakland facility, where the majority of the training will take place, and at the City of Industry facility, which consists of three people. She will coordinate training in Corona with the facility's HR Manager. Training records will all be sent to the Company Representative at the Oakland facility, where they will be entered and stored.</p> <p>McWane actively participates in Veteran outreach by participating in several Veteran</p>

	Job fairs on a yearly basis.
Substantial Contribution	N/A

3. Sample Curriculum

Provided below is a summary of the methods by which training will be delivered including a sample of the courses that will be offered.

Each of the Trainee groups will be able to take courses under the various delivery methods.

Delivery Method	Classroom/Simulated Laboratory
Training Type/Level	Sample Classes
Business Skills	1st Time Lead: Preparing for increased responsibilities, Leadership, Communications
Continuous Improvement Skills	Six Sigma, Lean Manufacturing, Quality Control
Manufacturing Skills	Production Machinery, Assembly Procedures
Hazardous Materials Skills	HAZMAT, HAZWOPER, OSHA 10/30
Computer Skills	Enterprise Resource Planning System, Microsoft Office
Computer Skills (AT)	Robotics
PL – Computer Skills	Robotics
PL – Manufacturing Skills	Production Machinery, Assembly Procedures
Literacy Skills	Mathematical Literacy, Literacy Skills
Business Skills - (E-Learning/Instructor Led)	1st Time Lead: Preparing for increased responsibilities, Leadership, Communications
Continuous Improvement Skills - (E-Learning/Instructor Led)	Six Sigma, Lean Manufacturing, Quality Control
Computer Skills - (E-Learning/Instructor Led)	Enterprise Resource Planning System, Microsoft Office
Hazardous Materials Skills - (E-Learning/Computer Based Training)	Hazardous Waste Material Handling, Hazardous Chemical Cleaning/Handling, Hazardous Waste Cleaning

4. Additional Company or Training Project Details

4.1 Program Waivers

The next table lists the various waivers and supporting justifications for training that apply to this proposed Training Project.

Waivers/Justification Type	Summary
None Identified	

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost
Development	None	N/A	N/A

Administrative	None	N/A	N/A
Training	TBD	TBD	TBD

4.3 Previous ETP Project Summary

None

4.4 Supporting Panel Proposal Documentation

Provided in Attachments 1, 2 and 3 is additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 1 – Group and Job Title Details

The proposed Training Project includes training for the following Trainees, organized by training group.

Group #: 1 – Retrainee				
County		ETP Minimum Wage		
Alameda County		\$17.63		
Los Angeles County		\$16.96		
Riverside County		\$16.16		
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post-Retention Wage
Alameda County				
Electricians	6	\$29.00 - \$35.00	\$0.00	\$29.00
Leadmen	21	\$22.45 - \$30.00	\$0.00	\$22.45
Leadmen in Training	5	\$20.50 - \$27.00	\$0.00	\$20.50
Machine Operators	30	\$22.00 - \$26.00	\$0.00	\$22.00
Managers	7	\$30.00 - \$50.00	\$0.00	\$30.00
Mechanics	30	\$27.00 - \$32.00	\$0.00	\$27.00
Production Workers	30	\$17.60 - \$20.50	\$0.03	\$17.63
Sales (Inside and out)	13	\$25.00 - \$50.00	\$0.00	\$25.00
Supervisors	18	\$24.00 - \$30.00	\$0.00	\$24.00
Supervisors in Training	11	\$20.50 - \$25.00	\$0.00	\$20.50
Los Angeles County				
Driver	1	\$18.00 - \$21.00	\$0.00	\$18.00
Inside Sales	1	\$20.00 - \$25.00	\$0.00	\$20.00
Shipping Supervisor	1	\$22.00 - \$28.00	\$0.00	\$22.00
Riverside County				
Administrative Staff	20	\$16.35 - \$28.00	\$0.00	\$16.35
Leads	7	\$17.35 - \$28.00	\$0.00	\$17.35

Attachment 1 – Group and Job Title Details

Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	
Managers/Supervisors	14	\$28.80 - \$50.00	\$0.00	\$28.80
Production Worker	38	\$14.40 - \$30.00	\$1.76	\$16.16

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	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	
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Electricians	1	\$29.00 - \$35.00	\$0.00	\$29.00
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Leadmen	1	\$22.45 - \$30.00	\$0.00	\$22.45
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Managers	3	\$30.00 - \$50.00	\$0.00	\$30.00
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Mechanics	2	\$27.00 - \$32.00	\$0.00	\$27.00
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Production Workers	5	\$17.60 - \$20.50	\$0.03	\$17.63
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Sales (Inside and out)	2	\$25.00 - \$50.00	\$0.00	\$25.00
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Supervisors	2	\$24.00 - \$30.00	\$0.00	\$24.00
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Managers/Supervisors	1	\$28.80 - \$50.00	\$0.00	\$28.80
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Production Worker	2	\$14.40 - \$30.00	\$1.76	\$16.16
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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.

<i>Delivery Method</i>	<i>Classroom/Simulated Laboratory</i>
Training Type/Level	Planned Course Offerings
<i>Business Skills</i>	
	Project Management
	Inventory Control
	Communications
	Critical Thinking/Problem Solving
	Negotiations Skills
	Supervising People
	Organizational Development
	Team Problem Solving/Managing Conflict & People
	Customer Relations
	Team Building/Leadership
	1st Time Lead: Preparing for increased Responsibilities
	Business Math
	Business Writing
	Accounting
<i>Computer Skills</i>	
	Microsoft Office Suite (Advanced/Intermediate)
	Enterprise Resource Planning System
<i>Computer Skills – Advanced</i>	Ratio 1:10
	Robotics
<i>Continuous Improvement</i>	
	5S
	Problem Solving/Critical Thinking
	Data Collection
	7 Basic Tools of Quality
	Six Sigma
	Quality Control
	Lean Manufacturing
<i>Hazardous Materials</i>	
	HAZMAT
	HAZWOPER
	OSHA 10/30
<i>Literacy Skills</i>	
	Mathematical Literacy
	Business Literacy

Attachment 2 – Training Delivery and Curriculum Listing

<i>Delivery Method</i>	<i>Classroom/Simulated Laboratory</i>	
Training Type/Level	Planned Course Offerings	
<i>Manufacturing Skills</i>		
	Production Machinery	
	Assembly Procedures	
<i>Delivery Method</i>	<i>E-Learning/ Instructor Led Distance Learning</i>	
Training Type/Level	Planned Course Offerings	
<i>Business Skills</i>		
	Project Management	
	Inventory Control	
	Communications	
	Critical Thinking/Problem Solving	
	Negotiations Skills	
	Supervising People	
	Organizational Development	
	Team Problem Solving/Managing Conflict & People	
	Customer Relations	
	Team Building/Leadership	
	1st Time Lead: Preparing for increased Responsibilities	
	Business Math	
	Business Writing	
	Accounting	
<i>Computer Skills</i>		
	Microsoft Office Suite (Intermediate/Advanced)	
	Enterprise Resource Planning System	
<i>Continuous Improvement</i>		
	5S	
	Problem Solving/Critical Thinking	
	Data Collection	
	7 Basic Tools of Quality	
	Six Sigma	
	Quality Control	
	Lean Manufacturing	

<i>Delivery Method</i>	<i>E-Learning – CBT</i>	
Training Type/Level	Planned Course Offerings	
<i>Hazardous Materials</i>		
	Hazardous Waste Material Handling	1 hour
	Hazardous Chemical Cleaning/Handling	1 hour

Attachment 2 – Training Delivery and Curriculum Listing

Delivery Method	E-Learning – CBT	
Training Type/Level	Planned Course Offerings	
	Hazardous Waste Cleaning	1 hour

<i>Delivery Method</i>	Productive Lab (PL)
Training Type/Level	Planned Course Offerings
<i>Computer Skills – Advanced</i>	Ratio 1:1
	Robotics
<i>Manufacturing Skills</i>	
	Assembly Procedures
	Production Machinery
<i>PL Justification</i>	
Need for Productive Laboratory Training	The Company requests additional PL hours above the standard cap of 60 to 80 hours. Trainees will receive up to 80 hours of PL training at a 1:1 trainer-to-trainee ratio. McWane will train employees on recently added coating and molding processes and equipment, and how the robot can assist new processes. Employees must learn new techniques in a productive environment. Because the new molds and new chemical coatings are entirely new processes, trainees will require many hours of training to learn how the process changes for different size pipes. Additionally, since the new molds allow larger pipes to be produced, existing machinery and processes must be modified to accommodate the larger pipes. Production Workers and Mechanics will receive between 40 and 80 hours of training depending on their areas of expertise.
Equipment/Processes to be Used	Casting/molding, cupola training, coating, injection molding, press, tool-and-die, assembly procedures, robot programming/operation. This includes assembly procedures and non-robotic production machinery such as that used in creating the molds.
Trainer Qualifications	Experienced Subject Matter Experts, Equipment Vendors, recipients of Train-the-Trainer training

Attachment 3 - Training Project Characteristics Details

Provided in the table are details on the training characteristics.

Characteristic	Program Summary
Retrainee - Veterans	To help provide veterans with necessary skills to enter the workforce and improve opportunities for advancement in high wage, secure jobs, the Panel incentivizes training for veterans. Training for veterans is reimbursed at a higher rate. Training hours may consist of up to 50% literacy or other basic skills training. Full-time employment is required for a minimum of 30 hours per week during 90-day retention period (or 500 hours within 272 days). The Retrainee Cap on hours (200) may be modified. Standard wage requirements apply.



*Glass, Molders, Pottery, Plastics & Allied Workers
International Union*

(AFL-CIO, CLC)

LOCAL NO. 164B

888 98th ave suite 201 Oakland ca. 94603 (510) 632-4774

4/6/2017

Employment training panel (ETP)

To whom it may concern

I IM writing to show our support for the ETP training program and
I IM writing to express my full support

Glass.molders.pottery.plastics. & Allied workers international
union

AFL.CIO.CLC.and its local 164B has worked closely with AB&I
over the years and feel confident expressing our full support for
this program

We. as a union body. believe strongly in growing and promoting
our members from inside. The advances that have been made in
manufacturing has created a need for a different set of skills and
Having this type of programs in place prepares our membership
Better to perform their jobs efficiently and at the same time
benefiting. The company with better skilled team member

We is the union will be ready to provide any support needed for
this endeavor

If you need any other information from us.please do not hesitate to
contact me at 510 632 4774

Sincerely

Fernando Garcia

Financial secretary/local representative



Panel Amendment #2 Proposal for:
Performance Foodservice - Southern California, a Division of
Performance Food Group, Inc.
Agreement Number: ET16-0461

Amendment Effective Date: June 23, 2017

Panel Meeting of: June 23, 2017

ETP Regional Office: North Hollywood

Analyst: L. Vuong

CURRENT PROJECT PROFILE

Contract Type:	Priority/Retrainee Job Creation	Industry Sector(s):	Goods Movement Transportation/Logistics Wholesale Trade
Counties Served:	Los Angeles	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Priority Industry:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Current Contract Term:	June 27, 2016 to June 26, 2018	Substantial Contribution:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

CURRENT FUNDING

Current Funding
\$181,780

AMENDMENT FUNDING

Requested Funding	Total Funding
\$117,060	\$298,840

AMENDMENT TRAINING PLAN TABLE

Job No.	Job Description (By Contract Type)	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Priority/Retrainee	Business Skills, Commercial Skills, Computer Skills, Cont. Imp., HazMat, Literacy Skills, OSHA 10/30	207	8-200	0	\$720	\$16.48
				Weighted Avg: 40			
2	Priority/Retrainee Job Creation	Business Skills, Commercial Skills, Computer Skills, Cont. Imp., HazMat, Literacy Skills, OSHA 10/30	70	8-200	0	\$2,140	\$13.73
				Weighted Avg: 107			

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

Minimum Wage by County: Job Number 1: \$16.48 per hour for Los Angeles County
 Job Number 2 (Job Creation): \$13.73 per hour for Los Angeles County.
Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: ☒ Yes ☐ No
 Up to \$2.48 per hour may be used to meet the Post-Retention Wage for Job Number 1.

Wage Range by Occupation	
Occupation Title	Wage Range
Job Number 1	
Driver	\$33.00 - \$50.00
Warehouse Staff	\$14.75 - \$16.00
Inventory Staff	\$17.10 - \$27.84
Sales Staff	\$26.44 - \$48.07
Purchasing Staff	\$20.41 - \$31.94
Quality Control Staff	\$35.00 - \$45.00
Administrative Staff	\$14.00 - \$20.00
HR Staff I	\$20.81 - \$50.00
HR Staff II	\$50.01 - \$60.00
Manager I	\$27.00 - \$57.00
Manager II	\$57.01 - \$60.00
Job Number 2 (Job Creation)	
Driver	\$24.00 - \$30.00
Warehouse Staff	\$14.75 - \$14.75
Sales Staff	\$13.73 - \$26.44
Manager	\$27.00 - \$57.00

INTRODUCTION

Founded in 1987 and located in the City of Industry, Performance Foodservice – Southern California, a Division of Performance Food Group, Inc. (PF–So. CA) (www.performancefoodservice.com) is an assembly food service distribution operation specializing in Italian and Italian-American food products, equipment, food related products and non-food items used within the food service industry. Major customers include Subway, Butterball, Campbell's, Coca Cola, General Mills, Kellogg's and Kraft Foods.

AMENDMENT DETAILS

The Company requests additional ETP funds to fully implement its original training program. Trainees are going through an aggressive training plan, including daily classes (4 to 8 hours per day, 3 to 5 days per week). The Company has provided training equivalent to 72% in eligible Class/Lab training hours with 9 months left to train. There will be no changes to curriculum, and the trainee population will stay the same. There is sufficient time remaining in the contract for the additional hours of training delivery.

Summary of Changes

- Increase amount by \$117,060, from \$181,780 to \$298,840.
- Increase the Average Cost per Trainee from \$540 to \$720 for Job Number 1 and from \$1,000 to \$2,140 for Job Number 2 (Job Creation).
- Increase weighted average hours from 30 to 40 hours for Job Number 1 and from 50 to 107 hours for Job Number 2.

RECOMMENDATION

Staff recommends approval of this Amendment.

SUMMARY OF PRIOR MODS/AMDS

Modification #1: Redistribute funds to Job Number 2.

CURRENT CONTRACT PERFORMANCE

The following table summarizes performance by PF–So. CA under the current ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees Enrolled	No. Completed Training	No. Retained
ET16-0461	\$181,780	06/27/2016– 06/26/2018	380	TBD	TBD

ET16-0461: Based on ETP Systems, 380 trainees have been enrolled and 245 trainees are still in training. The ETP Online Tracking System shows a total of 6,698 eligible hours for potential earnings of \$132,698 (73% of approved amount).

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

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- Payroll
- Marketing
- Business Planning
- Business Administration
- Business Report Writing and Editing
- Merchandising
- Financial Strategy
- Product Knowledge
- Strategic Planning
- Project Management (Evaluations/Monitoring)
- Communications Skills
- Customer Relations
- Sales Skills

COMMERCIAL SKILLS

- Fork Lift
- Commercial Drivers License
- Equipment Operation & Repair
- Warehousing
- Cross-Training in Production Equipment Skills

COMPUTER SKILLS

- Advanced Microsoft Office
- Publisher – News Letter, Customer Colateral
- Visio – Charting Design
- Manufacturing Resource Planning (MRP/ERP/SAP/Oracle)
- Salesforce Applications

CONTINUOUS IMPROVEMENT

- Statistical Process Control
- Problem Solving
- Team Building
- Quality Concepts
- Total Quality Management
- Just-In-Time Process
- Production Operations/Workflow
- Process Improvement
- Decision Making
- Leadership Skills
- Coaching Procedures
- Assembly Procedures
- Motivation
- Inventory Control

HAZARDOUS MATERIALS

- Dry Goods
- Refrigerated Foods
- Frozen Foods
- Chemical
- Hazardous Materials/Waste

LITERACY SKILLS

- Vocational English as a second language (VESL) – Writing, Reading, Comprehension

OSHA 10/30 (Certified OSHA Instructor)

- OSHA 10 (Requires Completion of 10 hours)
- OSHA 30 (Requires Completion of 30 hours)

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

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



TRAINING PROPOSAL FOR
Rich Products Corporation
17- 0622

Panel Meeting Date: 06/23/2017
Regional Office: Sacramento Regional Office
Analyst Name: Mam, Karen
Type of Proposal: Single Employer Contract (SE)
Funding Source: Out-of-State Competition (OSC)

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$177,390.00			
Program & Admin Cost	Support Cost	Substantial Contribution (\$ / %)	Total In-Kind
\$177,390.00	N/A	N/A	\$205,000.00

APPLICANT PROFILE

<i>Company Summary</i>	Headquartered in Buffalo, NY, Rich Products Corporation (Rich Products) is a world leader in manufacturing non-dairy toppings and icings for cakes and desserts, frozen food such as pizza, and bakery products servicing in-store bakeries, retail marketplaces and the food service industry.
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<i>Industry Sector(s)</i>	Manufacturing
<i>Priority Industry</i>	Yes
<i>No. of Employees (Applicant)</i>	State: <u>1,200</u> US: <u>5,000</u> World Wide: <u>7,500</u>
<i>Turnover Rate (Applicant)</i>	10.00%.
<i>Repeat Contractor</i>	Yes
<i>High Unemployment Area</i>	Yes
<i>Unions</i>	Teamsters 431

TRAINING PROFILE

**Training
Objective**

Training will provide employees with the needed skills to operate new equipment on the production floor.

Training is summarized below. Additional details are provided in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# of Trainees	Reimbursement Rate	Avg. Hours	Cost Per Trainee	Min – Max Hour
1	Retrainees	129	\$18.00	53	\$954.00	8-200
2	Retrainees, Veterans	14	\$22.00	53	\$1,166.00	8-200
3	Retrainees, Job Creation	20	\$20.00	95	\$1,900.00	8-200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details on the proposed Training Project.

1. Company Background

Founded in 1945 and headquartered in Buffalo, NY, Rich Productions is a leading supplier and solutions provider to the foodservice, in-store bakery and grocery retail marketplaces. The Company produces frozen non-dairy whipped topping, bakery items, desserts, shrimp/seafood, appetizers/ snacks, gluten-free and all-natural items. The Company has more than 50 facilities across six countries with products being sold in over 100 countries. Training under this proposal will be at the Fresno facility.

2. Current Training Project Details

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

<i>Purpose of Training</i>	<p>This is Rich Products' fourth Agreement, third at the Fresno location in the last five years. In the previous Agreements, Rich Products focused on their Manufacturing Line Optimization Program. Training under this proposal will focus on new equipment being installed during the 3rd and 4th quarter of 2017. The Company has invested \$4.7 million in production equipment which includes a Spiral Freezer, Silo Cooling System, Safeline Metal Detector, and Bridge Dumper/Breadline. Training will ensure workers are proficient in new processes and equipment.</p> <p>The Company will also train on advanced Lean manufacturing topics. Training will give trainees the skills to help improve processes and production to increase capacity while maintaining quality and reducing waste.</p> <p>Rich Product will be expanding their workforce to support the new equipment being installed on the production floor. The Company has committed to hiring 20 new 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 the contract.</p>
<i>Training Infrastructure and Administrative Plan</i>	<p>The Company has a dedicated HR Manager to coordinate all training efforts including maintaining rosters, scheduling training, verifying training and retention completion and participating in ETP monitoring activities while ensuring compliance with all ETP requirements. All training will be done by in-house subject-matter experts. Additionally, the Company has engaged the services of a third-party administrator with extensive ETP administration experience to complete the project successfully.</p>
<i>Marketing Plan</i> (MEC Only)	N/A
<i>Support Cost Description</i> (MEC Only)	N/A
<i>Substantial Contribution Description</i>	N/A

3. Sample Curriculum

Provided below is a summary of the methods by which training will be delivered including a sample of the courses that will be offered.

Each of the Trainee groups will be able to take courses under the various delivery methods.

Delivery Method	Classroom/Simulated Laboratory
Training Type/Level	Sample Classes
Business Skills	Account Development Training
	Effective Communications
Commercial Skills	Refrigeration Systems Repair and Maintenance
	Stainless Steel Welding
Computer Skills	Bulls Eye Manufacturing Software Training
	Materials Resources Planning Software
Continuous Improvement Skills	British Retail Consortium
	Teambuilding
Management Skills	Long Term Strategic Planning Principles
Manufacturing Skills	Production Equipment Operation
	Food Manufacturing

Delivery Method	Productive Lab
Training Type/Level	Training Course(s)
Manufacturing Skills	Production Equipment Operation
Justification Summary: Rich Products will be purchasing and installing new equipment. PL training is necessary to train staff up to levels of proficiency while ensuring safety and production standards are met. PL training will allow practical, hands-on experience in a working environment without creating an excess of waste. The Company will train 139 Production Staff, Supervisors, Quality Control Staff, and Maintenance Mechanics. Each trainee will receive up to 20 hours of PL training. Rich Products is requesting the trainer-to-trainee ratio of 1:2 because it requires two employees to operate the equipment.	

4. Additional Company or Training Project Details

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

4.1 Program Waivers

The next table lists the various waivers and supporting justifications for training that apply to this proposed Training Project.

Waivers/Justification Type	Summary
Reduced Standard Wage (HUA)	105 trainees in Group 1 and 2 work in a High Unemployment Area (HUA), region with unemployment exceeding the state average by 25%. Rich Products is requesting a wage modification from \$16.16 to \$12.12 for trainees in Job Numbers 1 and 2.

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost
Development	Strategic Business Solutions, LLC	Visalia	\$8,250.00
Administrative	Strategic Business Solutions, LLC	Visalia	13% of funds earned
Training	To be determined		

4.3 Previous ETP Project Summary

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

Active Contract(s) Elements	Summary
Agreement Number	ET15-0402
Purpose of Training	Training focused on Phase 2 of the Manufacturing Line Optimization Program which further developed staff production efficiency and allowed employees to properly integrate data and function adjustments to production equipment.
Location(s)	Fresno
Term	04/01/2015 – 03/31/2017
Approved Amount	\$108,200.00
Projected Earnings	Earned – Approved: \$100,713.00 Earned – In Process: \$6,685.00
Performance Percentage	99%
Other Notes	Based on ETP Systems, 5771 have been tracked for potential earnings of \$108,571.00 (99% of approved amount). 6 trainees are pending review for placement.

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

Past Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance %
ET12-0431	Fresno, Santa Fe Springs, South San Francisco/ Union City	06/30/12 – 06/29/14	\$407,610	\$79,376.00	19%
Notes	The contractor's low performance was due to a plant closure in Santa Fe Springs and layoffs of a majority of upper management in Union City and the remaining Santa Fe Springs facility as a result of the economic downturn. Training did not occur as planned due to a lack of leadership. However, the Fresno Plant earned 56% of the training funds for that facility. Thus, the Company is currently requesting funds for training at the Fresno Plant. The Company improved their administration process. The Company has secured				

Past Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance %
	an administrative contractor as well as dedicated internal staff in place to administer the Contract. A comprehensive training schedule is in place to ensure completion of 100% of the requested funding.				

4.4 Supporting Panel Proposal Documentation

Provided in Attachments 1, 2 and 3 is additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 1 – Group and Job Title Details

The proposed Training Project includes training for the following Trainees, organized by training group.

Group #: 1 – Retrainees	
County	ETP Minimum Wage
Fresno	\$16.16
Fresno (HUA)	\$12.12

Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post Retention Wage
Fresno County				
Administration Staff	11	\$19.00 - \$40.00	\$0.00	\$19.00
Managers/Supervisors	15	\$19.00 - \$42.00	\$0.00	\$19.00
Maintenance Mechanic	7	\$20.30 - \$23.43	\$0.00	\$20.30
Production Staff (HUA)	77	\$15.00 - \$19.25	\$0.00	\$15.00
Quality Control Staff (HUA)	8	\$15.20 - \$19.01	\$0.00	\$15.20
Warehouse/Shipping (HUA)	11	\$15.20 - \$19.01	\$0.00	\$15.20

Group #: 2 Retrainees, Veterans	
County	ETP Minimum Wage
Fresno	\$16.16
Fresno (HUA)	\$12.12

Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post Retention Wage
Administration Staff	1	\$19.00 - \$40.00	\$0.00	\$19.00
Managers/Supervisors	2	\$19.00 - \$42.00	\$0.00	\$19.00
Maintenance Mechanic	2	\$20.30 - \$23.43	\$0.00	\$20.30
Production Staff (HUA)	8	\$15.00 - \$19.25	\$0.00	\$15.00
Warehouse/Shipping (HUA)	1	\$15.20 - \$19.01	\$0.00	\$15.20

Attachment 1 – Group and Job Title Details

Group #: 3 Retrainees, Job Creation				
County		ETP Minimum Wage		
Fresno		\$13.22		
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post Retention Wage
Production Staff	20	\$13.00 - \$15.00	\$0.22	\$13.22

Attachment 2 – Training Delivery and Curriculum Listing

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

<i>Delivery Method</i>	<i>Classroom/Simulated Laboratory</i>
Training Type/Level	Planned Course Offerings
<i>Business Skills</i>	
	Account Development Training
	Effective Communications
<i>Commercial Skills</i>	
	Boiler Machinery Equipment Testing and Maintenance
	Refrigeration Systems Repair and Maintenance
	Rotary Valve Pump Maintenance and Repair
	Stainless Steel Welding (Advanced)
<i>Computer Skills</i>	
	Bulls Eye Manufacturing Software Training
	Materials Resource Planning Software
<i>Continuous Improvement Skills</i>	
	British Retail Consortium
	Supervisors Training Boot Camp
	Teambuilding
<i>Management Skills</i>	
	Long Term Strategic Planning Principles
	Vendor Relations
<i>Manufacturing Skills</i>	
	Adjustable Bridge Dumper-Breadline
	Flour Dusters
	Food Manufacturing
	Food Product Safety
	Manufacturing Line Optimization Program
	Materials Handling Equipment
	Mixers
	Pallet Flipper
	Production Equipment Operation
	Ribbon Blending Equipment
	Safeline Metal Detecting System
	Sanitation Best Practices
	Spiral Freezer
	Warehouse Racking and Conveyance Equipment

Attachment 2 – Training Delivery and Curriculum Listing

<i>Delivery Method</i>	<i>Classroom/Simulated Laboratory</i>
Training Type/Level	Planned Course Offerings
<i>Delivery Method</i>	Productive Lab (PL)
<i>Manufacturing Skills</i>	
	Adjustable Bridge Dumper-Breadline
	Flour Dusters
	Mixers
	Pallet Flipper
	Production Equipment Operation
	Ribbon Blending Equipment
	Safeline Metal Detecting System
	Spiral Freezer
	Warehouse Racking and Conveyance Equipment
<i>PL Justification</i>	
Need for Productive Laboratory Training	Rich Products will be purchasing and installing new equipment. PL training is necessary to train staff to levels of proficiency while ensuring safety and production standards are met. PL training will allow practical, hands-on experience in a working environment without creating an excess of waste. The Company will train approximately 139 Production Staff, Supervisors, Quality Control Staff, and Maintenance Mechanics. Each trainee will receive up to 20 hours of PL training. Rich Products is requesting the trainer-to-trainee ratio of 1:2 because it requires two employees to operate the equipment.
Equipment/Processes to be Used	Equipment to be used during PL includes Safeline Metal Detecting System, Spiral Freezer, Warehouse Racking and Conveyance Equipment, Table Line Mixer, Adjustable Bridge Dumper-Breadline, and Pallet Flipper.
Trainer Qualifications	All trainers are subject-matter experts. The trainers will demonstrate proper use of equipment, observe the trainee using the equipment, and offer coaching to ensure the trainee will meet production requirements.

Attachment 3 - Training Project Characteristics Details

Provided in the table are details on the training characteristics.

Characteristic	Program Summary
Retrainee - Job Creation	The Panel incentivizes job creation. Training for newly-hired employees is reimbursed at a higher rate, and trainees are subject to a lower post-retention wage. The date of hire for trainees is within the three-month period before contract approval, or within the term of the contract. Trainees are hired into “net new jobs” as a condition of contract. Substantial Contribution and Turnover Rate penalty requirements do not apply. Employer must demonstrate expanded or new facilities, new equipment or machinery, expanded business capacity or other measureable investment in hiring workers and expanding their California workforce.
Retrainee - Veterans	To help provide veterans with necessary skills to enter the workforce and improve opportunities for advancement in high wage, secure jobs, the Panel incentivizes training for veterans. Training for veterans is reimbursed at a higher rate. Training hours may consist of up to 50% literacy or other basic skills training. Full-time employment is required for a minimum of 30 hours per week during 90-day retention period (or 500 hours within 272 days). The Retrainee Cap on hours (200) may be modified. The Company does not specifically outreach to Veterans however, they do have Veterans employed.

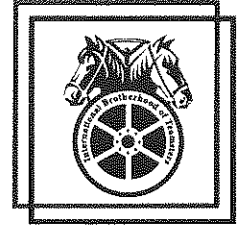
GENERAL TEAMSTERS UNION LOCAL NO. 431

*Packinghouse Employees, Warehousemen, Drivers and Helpers, Dried Fruit and Nut Packers and Dehydrators;
Fresno and Madera Counties, California*

Affiliated with the International Brotherhood of Teamsters

President, Peter Núñez • Secretary-Treasurer, Lennie Wells • Vice-President, Fred Willshaw

Recording-Secretary, Chris Garlick • Trustees, Cliff Amende, Rod Hollett & Steve Sharp



May 19, 2017

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

Re: ETP Training Program

The International Brotherhood of Teamsters Union Local No. 431 supports the ETP Training Program at Rich Products. We represent the Members employed by Rich Products at the Fresno Plant in California located at 320 "O" Street Fresno CA 93721. The program will provide our Members with skills needed to meet operational demands which in turn will provide a more secure work environment for the future.

If you have any questions, please do not hesitate to contact me at (559) 486-5410 ext 19.

Sincerely,

A handwritten signature in cursive script, reading "Lennie Wells", is positioned above the typed name.

Lennie Wells
Secretary-Treasurer
General Teamsters Union Local No. 431

LW/ed



TRAINING PROPOSAL FOR
Rudolph and Sletten, Inc.
17- 0529

Panel Meeting Date: 06/23/2017
Regional Office: San Francisco Bay Area Regional Office
Analyst Name: Hoover, Chris
Type of Proposal: Single Employer Contract (SE)
Funding Source: OSC

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$196,344.00			
Program & Admin Cost	Support Cost	Substantial Contribution (\$ / %)	Total In-Kind
\$196,344.00	N/A	N/A	\$761,327.00

APPLICANT PROFILE

Company Summary	Rudolph and Sletten, Inc. (RS) is a general contractor and a building construction management company that provides a range of construction services including preconstruction, construction, project management, delivery methods, building information modeling (BIM) and Lean evolution.
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Industry Sector(s)	Construction
Priority Industry	Yes
No. of Employees (Applicant)	State: <u>1,000</u> US: <u>10,000</u> World Wide: <u>10,000</u>
Turnover Rate (Applicant)	10.00%.
Repeat Contractor	No
High Unemployment Area	No
Unions	Carpenters 46 Northern California Counties Conference Board

TRAINING PROFILE

<i>Training Objective</i>	Provide training in construction services for preconstruction, construction, project management, delivery methods, BIM and Lean evolution to offer new energy efficient services.
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Training is summarized below. Additional details are provided in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# of Trainees	Reimbursement Rate	Avg. Hours	Cost Per Trainee	Min – Max Hour
1	Retrainees	606	\$18.00	18	\$324	8-200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details on the proposed Training Project.

1. Company Background

Founded in 1962 and headquartered in Redwood City, RS is a general contractor and a building construction management company providing a range of construction services including preconstruction, construction, project management, delivery methods, BIM and Lean evolution. RS's portfolio include public and private buildings: hospitals, courthouses, academic buildings, office buildings and tenant improvements.

2. Current Training Project Details

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

<i>Purpose of Training</i>	<p>To remain competitive, the Company must upgrade skills to streamline processes, to deliver the highest level of service design through final closeout. Employees will receive technical training, updates in recent trends, and innovations. Training will allow the Company to offer timely, accurate and sound expertise. Staff will learn to review job-site work to ensure blueprints and work specs are met and to analyze errors and corrections upon completion.</p> <p>In addition, the construction management and building issues are becoming increasingly complex. RS must use current technology, such as BMI, to provide solutions. BMI allows architecture, engineering and construction professionals to use a 3D model-based process to efficiently plan, design, construct, and manage buildings and infrastructure. RS must train staff on all aspects of the construction industry in order to continue providing the best possible solutions to its clients.</p> <p>The following RS locations will participate in the ETP-funded training: the corporate headquarters' in Redwood City; the San Francisco regional office; the Sacramento regional office in Roseville; and the Southern California offices in Irvine and San Diego.</p>
<i>Training Infrastructure and Administrative Plan</i>	<p>ETP funds will not displace the Company's existing financial commitment. Training courses include safety, discipline-specific courses related to virtual design, scheduling, accounting, project management, leadership, continuous improvement and writing skills.</p> <p>The RS training department consists of two internal staff members (located at the headquarters' location in Redwood City), leaders in their particular field of expertise and/or vendors. There will be a training coordinator at each location to facilitate administration of training and assume responsibility for managing rosters.</p> <p>Additionally, RS retained Training Refund Group (TRG) to assist with administration. TRG has a lead and two support staff involved with the tracking and reporting of the training hours.</p>
<i>Substantial Contribution Description</i>	N/A

3. Sample Curriculum

Provided below is a summary of the methods by which training will be delivered including a sample of the courses that will be offered.

Each of the Trainee groups will be able to take courses under the various delivery methods.

Delivery Method	Classroom/Simulated Laboratory
Training Type/Level	Sample Classes
Commercial Skills / Standard	Electrical Codes
	Estimating
	Project Management
Business Skills	Business Writing
	Team Building
	Process Improvement
Computer Skills / Standard	Intermediate Microsoft Office

4. Additional Company or Training Project Details – Keep all subparagraphs

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

4.1 Program Waivers

The next table lists the various waivers and supporting justifications for training that apply to this proposed Training Project.

Waivers/Justification Type	Summary
None have been requested.	

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost
Development	Training Refund Group (TRG)	Anaheim	\$8,000.00
Administrative	Training Refund Group (TRG)	Anaheim	13% of earned funds
Training	Learn IT! (Business Skills)	San Francisco	\$28,000.00

4.3 Previous ETP Project Summary - In this section the tables can be deleted if not needed

RS does not have an active or previous ETP project.

4.4 Supporting Panel Proposal Documentation

Provided in Attachments 1, 2 and 3 is additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project. The proposed Training Project includes training for the following Trainees, organized by training group.

Attachment 1 – Group and Job Title Details

The proposed Training Project includes training for the following Trainees, organized by training group.

Group #: 1 – Retrainees				
County		ETP Minimum Wage		
San Mateo		\$17.63		
Placer		\$16.16		
San Francisco		\$17.63		
Orange		\$17.22		
San Diego		\$16.72		
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post Retention Wage
San Mateo County				
Administrative	35	\$21.00 - \$50.00	\$0.00	\$21.00
Foreman	20	\$32.00 - \$54.00	\$0.00	\$32.00
Labor	80	\$31.00 - \$54.00	\$0.00	\$31.00
Project Coordinator 1	15	\$22.00 - \$51.00	\$0.00	\$22.00
Project Coordinator 2	58	\$53.00 - \$82.00	\$0.00	\$53.00
Project Coordinator 3	42	\$84.00 - \$113.00	\$0.00	\$84.00
Supervisor	63	\$45.00 - \$74.00	\$0.00	\$45.00
Project Management	19	\$83.00 - \$112.00	\$0.00	\$83.00
Placer County				
Administrative	2	\$21.00 - \$50.00	\$0.00	\$21.00
Foreman	5	\$32.00 - \$54.00	\$0.00	\$32.00
Labor	9	\$31.00 - \$54.00	\$0.00	\$31.00
Project Coordinator 1	11	\$22.00 - \$51.00	\$0.00	\$22.00
Project Coordinator 2	8	\$53.00 - \$82.00	\$0.00	\$53.00
Project Coordinator 3	1	\$84.00 - \$84.00	\$0.00	\$84.00

Attachment 1 – Group and Job Title Details

Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post Retention Wage
Supervisor	1	\$55.00 - \$55.00	\$0.00	\$55.00
<i>San Francisco County</i>				
Administrative	1	\$22.00 - \$22.00	\$0.00	\$22.00
<i>Orange County</i>				
Administrative	3	\$21.00 - \$50.00	\$0.00	\$21.00
Foreman	6	\$32.00 - \$54.00	\$0.00	\$32.00
Labor	20	\$31.00 - \$54.00	\$0.00	\$31.00
Project Coordinator 1	17	\$22.00 - \$51.00	\$0.00	\$22.00
Project Coordinator 2	15	\$53.00 - \$82.00	\$0.00	\$53.00
Project Coordinator 3	7	\$84.00 - \$113.00	\$0.00	\$84.00
Supervisor	12	\$45.00 - \$74.00	\$0.00	\$45.00
<i>San Diego County</i>				
Administrative	4	\$21.00 - \$50.00	\$0.00	\$21.00
Foreman	16	\$32.00 - \$54.00	\$0.00	\$32.00
Labor	64	\$31.00 - \$54.00	\$0.00	\$31.00
Project Coordinator 1	25	\$22.00 - \$51.00	\$0.00	\$22.00
Project Coordinator 2	25	\$53.00 - \$82.00	\$0.00	\$53.00
Project Coordinator 3	3	\$84.00 - \$113.00	\$0.00	\$84.00
Supervisor	19	\$45.00 - \$74.00	\$0.00	\$45.00

Attachment 2 – Training Delivery and Curriculum Listing

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

<i>Delivery Method</i>	<i>Classroom/Simulated Laboratory</i>
Training Type/Level	Planned Course Offerings
<i>Business Skills</i>	
	Business Writing
	Financial Operations
	Insurance and Bonding
	Process Improvement
	Team Building
<i>Commercial Skills / Standard</i>	
	Completed Job Case Studies
	Electrical Codes
	Estimating
	How to Conduct a Jobsite Walk
	Project Management
<i>Computer Skills / Standard</i>	
	Intermediate Microsoft Office

Attachment 3 - Training Project Characteristics Details

Provided in the table are details on the training characteristics.

Characteristic	Program Summary
Retrainee (Priority Industry)	Rudolph and Sletten, Inc. is eligible for standard retraining as a company primarily engaged in providing services in California that regularly competes with services providers located out-of-state as outlined under Title 22, CCR, Section 4416(d)(3).

CARPENTERS

46 Northern California Counties Conference Board

BILL FEYLING
Executive Director

May 11, 2017

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

To Whom It May Concern:

It is our understanding that Rudolph and Sletten, Inc. is requesting assistance with training funds for the State of California's Employment Training Panel (ETP). Rudolph and Sletten, Inc. sees the importance and value of training its workforce in new and developing technology in order to increase quality, productivity, and customer service. Training also helps employees broaden their existing skills.

The Carpenters 46 Northern California Counties Conference Board or Carpenters Union represents a major portion of outfitting employees at Rudolph and Sletten, Inc. with a collective bargaining agreement through 2019. We plan to be involved in the planning and operation of this new effort, especially as it impacts the skills and performance of our members.

We support this effort to improve employee skills and make Rudolph and Sletten, Inc. more competitive in the commercial building market.

Sincerely,



William Feyling
Executive Director

WF:tc

cc: Scott Saulsbury, Controller, Rudolph and Sletten, Inc.
Paul Aherne, Senior Vice President and General Counsel



TRAINING PROPOSAL FOR
Shaw Diversified Services, Inc.
17- 0676

Panel Meeting Date: 06/23/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Reeves, Mark
Type of Proposal: Single Employer Contract (SE)
Funding Source: Out-of-State Competition (OSC)

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$188,190.00			
Program & Admin Cost	Support Cost	Substantial Contribution (\$ / %)	Total In-Kind
\$188,190.00	N/A	N/A	\$300,000.00

APPLICANT PROFILE

<i>Company Summary</i>	Shaw Diversified Services, Inc. (Shaw) is a flooring company that manufactures carpets and rugs for residential and commercial applications. The Company is headquartered in Santa Fe Springs, CA.
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<i>Industry Sector(s)</i>	Manufacturing
<i>Priority Industry</i>	Yes
<i>No. of Employees (Applicant)</i>	State: <u>600</u> US: <u>25,000</u> World Wide: <u>30,000</u>
<i>Turnover Rate (Applicant)</i>	8.00%.
<i>Repeat Contractor</i>	Yes
<i>High Unemployment Area</i>	No
<i>Unions</i>	No

TRAINING PROFILE

**Training
Objective**

To remain competitive, Shaw must improve its operational efficiencies and strategic competencies, while maintaining a functional and diverse line of products.

Training is summarized below. Additional details are provided in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# of Trainees	Reimbursement Rate	Avg. Hours	Cost Per Trainee	Min – Max Hour
1	Retrainees	205	\$18.00	51	\$918	8-200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details on the proposed Training Project.

1. Company Background

Founded in 1946 and headquartered in Santa Fe Springs, Shaw manufactures and sells carpet to a customer base ranging from local retail stores to national carpet retailers and distributors. The Company also sells directly to builders, commercial contractors, and dealers. Shaw's flooring choices are available in numerous styles and color combinations.

2. Current Training Project Details

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

Purpose of Training	<p>The proposed training will help Shaw improve its manufacturing process delivery and product reliability; and introduce new technology.</p> <p>The Company has identified the need for training in the areas of equipment operation, quality control, problem solving, and frontline leadership. In addition, as Shaw continues to bring product improvements to the market, it must deliver training to sales staff on new product knowledge.</p> <p>Training will be conducted at the Company's facility in Santa Fe Springs. Instruction will be delivered by a combination of in-house subject matter experts and vendors to be identified during the contract term.</p>
Training Infrastructure and Administrative Plan	Shaw's Training Manager will oversee the scheduling, delivery, and tracking of training to ensure that project administration meets ETP requirements.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Sample Curriculum

Provided below is a summary of the methods by which training will be delivered including a sample of the courses that will be offered.

Each of the Trainee groups will be able to take courses under the various delivery methods.

Delivery Method	Classroom/Simulated Laboratory
Training Type/Level	Sample Classes
Business Skills	Strategies for Effective Communication
	Establishing and Achieving Goals
	Enhanced Product Knowledge

Computer Skills	Quality System Training
	Procurement System Training
	Programmable Logic Controllers (PLC) Training
Continuous Improvement Skills	Root Cause Analysis
	Improving Workflow
	Teambuilding
Hazardous Materials Skills	Hazard Communication Training
	Waste Stream Management
Management Skills	Crucial Conversations
	Shaw Talent Strategy – Competency Training
Manufacturing Skills	Equipment Operation & Procedures Training
	Quality Control Training
	Maintenance Troubleshooting
Delivery Method	E-Learning/Computer Based Training (CBT)
Training Type/Level	Sample Classes
Computer Skills	Google Sheets Training
	Google Docs Training
	Google Drive Training
Delivery Method	Productive Lab (PL)
Training Type/Level	Sample Classes
Manufacturing Skills	Reliability Technician Skills Training
	Reliability Electrician Skills Training
PL Justification	
Need for Productive Laboratory Training	Shaw believes that PL training is the most effective way to ensure that maintenance process knowledge is transferred, retained, and further developed. Approximately 24 Maintenance/Electrical Associates will receive up to 40 hours of Productive Lab training in accordance with ETP guidelines,
Equipment/Processes to be Used	Hand tools, mechanical/electrical concept applications, and production line equipment.
Trainer Qualifications	Training will be delivered by skilled craftspeople with demonstrated knowledge and expertise in carpet mill machinery.

4. Additional Company or Training Project Details

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

4.1 Program Waivers

The next table lists the various waivers and supporting justifications for training that apply to this proposed Training Project.

Waivers/Justification Type	Summary
None have been requested	

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost
Development	None Identified		
Administrative	None Identified		
Training	None to Date		

4.3 Previous ETP Project Summary

Shaw has no previous ETP contracts within the last five years.

4.4 Supporting Panel Proposal Documentation

Provided in Attachments 1, 2 and 3 is additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 1 – Group and Job Title Details

The proposed Training Project includes training for the following Trainees, organized by training group.

Group #: 1 – Retrainees				
County		ETP Minimum Wage		
Los Angeles County		\$16.96		
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post Retention Wage
Glenn County				
Administrative Associate	16	\$17.24 - \$24.70	\$0.00	\$17.24
Administrative Associate II	6	\$25.23 - \$48.53	\$0.00	\$25.23
Maintenance/Electrical Associate	24	\$18.22 - \$33.34	\$0.00	\$18.22
Manager	12	\$37.19 - \$53.74	\$0.00	\$37.19
Production Associate	131	\$13.38 - \$26.23	\$3.75	\$16.96
Project Lead	5	\$31.69 - \$45.85	\$0.00	\$31.69
Supervisor	11	\$32.21 - \$42.13	\$0.00	\$32.21

Attachment 2 – Training Delivery and Curriculum Listing

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

<i>Delivery Method</i>	<i>Classroom/Simulated Laboratory</i>
Training Type/Level	Planned Course Offerings
<i>Business Skills</i>	
	Conflict Management
	Enhanced Product Knowledge
	Enhancing Business Skills Training
	Establishing and Achieving Goals
	Strategies for Effective Communication
	Conflict Management
<i>Computer Skills</i>	
	Gmail Training
	Google Sheets Training
	Google Docs Training
	Google Drive Training
	Google Calendar Training
	EHS System Training
	Quality System Training
	Procurement System Training
	Programmable Logic Controllers (PLC) Training
<i>Continuous Improvement Skills</i>	
	Eliminating Waste
	Frontline Leadership
	Improving Workflow
	Mentee Training
	Problem Solving & Decision Making
	Quality Assurance Training
	Root Cause Analysis
	Standard Work
	Teambuilding
<i>Hazardous Materials Skills</i>	
	Hazard Communication Training
	Waste Stream Management
<i>Management Skills</i>	
	Crucial Conversations` Shaw Talent Strategy - Competency Training

Attachment 2 – Training Delivery and Curriculum Listing

<i>Delivery Method</i>	<i>Classroom/Simulated Laboratory</i>
Training Type/Level	Planned Course Offerings
<i>Manufacturing Skills</i>	
	Cross Training in Production Processes & Procedure
	Electrician Technical Skills Training
	Equipment Operation & Procedures Training
	Lead Technical Skills Training
	Maintenance Troubleshooting
	Mechanic Technical Skills Training
	Quality Control Training
	Safety & Compliance Training
	Standard Procedures Training
	Welding

<i>Delivery Method/Level</i>	<i>Electronic Learning/Computer Based Training (CBT)</i>	
Training Type/Level	Planned Course Offerings	Standard Hours
<i>Computer Skills</i>		
	Gmail Training	4.00
	Google Calendar Training	2.00
	Google Docs Training	2.00
	Google Drive Training	8.00
	Google Sheets Training	24.00
<i>CBT Details</i>		
Percentage of Curriculum that is CBT Hours		5%

<i>Delivery Method/Level</i>	<i>Productive Lab</i>
Training Type/Level	Planned Course Offerings
<i>Manufacturing Skills</i>	
	Reliability Electrician Skills Training (Hands-On)
	Reliability Technician Skills Training (Hands-On)
<i>PL Justification and Details</i>	
Explain the need for productive laboratory (PL) training.	Shaw has a need to develop our current maintenance technicians - such as our Reliability Mechanics and Electricians. This training will ensure that the maintenance process knowledge is transferred, retained and further developed. We currently have an aging

Attachment 2 – Training Delivery and Curriculum Listing

<i>Delivery Method/Level</i>	<i>Productive Lab</i>
Training Type/Level	Planned Course Offerings
	workforce with highly specialized Carpet Mill machinery skills that needs to be transferred to less senior associates for production reliability and sustainability of our product and product lines.
Describe the Equipment/Processes to be used in delivering PL training	Hands-on Training will include the use of actual hand-tools, theoretical mechanics and electrical concept application on our Color Dye House and Finishing production-line equipment. The delivery method will include classroom, simulation labs, and PL training.
Describe Trainer Qualifications:	Shaw qualified skilled craftspeople to provide this one-on-one knowledge transfer.

Attachment 3 - Training Project Characteristics Details

Provided in the table are details on the training characteristics.

Characteristic	Program Summary
None	Standard retrainee program with no additional characteristics.



Panel Amendment #1 Proposal for:
The SYGMA Network, Inc.
Agreement Number: ET16-0453

Amendment Effective Date: June 23, 2017

Panel Meeting of: June 23, 2017

ETP Regional Office: North Hollywood

Analyst: M. Paccarelli

CURRENT PROJECT PROFILE

Contract Type:	Priority/Retrainee	Industry Sector(s):	Warehousing
			Transportation/Logistics
Counties Served:	Los Angeles	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Priority Industry:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Current Contract Term:	May 10, 2016 to May 9, 2018	Substantial Contribution:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

CURRENT FUNDING

Current Funding
\$99,144

AMENDMENT FUNDING

Requested Funding	Total Funding
+\$36,720	\$135,864

AMENDMENT 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	Priority Rate Retrainee	Continuous Imp; Computer Skills; Business Skills; Comm'l Skills; PL – Comm'l Skills	204	8-200	0-14	\$666	\$16.48
				Weighted Avg: 37			

Minimum Wage by County: \$16.48 in Los Angeles County

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

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

Up to \$4.48 may be added to meet the ETP minimum wage

Wage Range by Occupation	
Occupation Title	Wage Range
Warehouse Manager	\$18.35 - \$21.60
Administrative Staff	\$12.00 - \$18.20
Transportation Staff	\$26.00 - \$35.00
Maintenance Staff	\$16.42 - \$29.71
Manager/Supervisor	\$14.00 - \$52.00

INTRODUCTION

Located in Lancaster, the SYGMA Network, Inc. (SYGMA) is a foodservice distributor to restaurant chains in the United States. The Company warehouses, distributes, and delivers food products, beverages, equipment and supplies to chain restaurants throughout Southern California, Arizona and Nevada. Its customers include Panera Bread, Wing Stop, Panda Express, Einstein, Checker Rally's, Jenny Craig and Fire House Subs.

AMENDMENT DETAILS

SYGMA is requesting funding for an additional 10 hours per trainee, with 92% of hours recorded already. Staff needs the additional hours to complete training on new equipment and processes.

In summary:

- The funding amount will increase by \$36,720, from \$99,144 to \$135,864.
- The weighted average hours in Job Number 1 will increase from 27 to 37.
- The average cost per trainee in Job Number 1 will increase from \$486 to \$666.

RECOMMENDATION

Staff recommends approval of this Amendment.

PRIOR MODIFICATIONS/AMENDMENTS

N/A

CURRENT CONTRACT PERFORMANCE

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

Agreement No.	Approved Amount	Term	No. Trainees Enrolled	No. Completed Training	No. Retained
ET16-0453	\$99,144	05/10/2016-05/09/2018	312	0	0

To date, 5,154 eligible training hours have been tracked (92% of the current Agreement amount).

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

8-200

Trainees may receive any of the following:

CONTINUOUS IMPROVEMENT

- Change Management
- Critical Thinking
- Coaching Skills
- Problem Solving
- Quality Assurance
- SYGMA Food Safety
- SYGMA Quality Standards
- Team Communication

COMPUTER SKILLS

- Cuba Scan
- Computerized Inventory
- Contact Management
- Laptop Techniques
- Mobile Scanners
- Onboard Truck Software
- Smartphone Applications
- SYGMA Desktop Applications
- Tablet Applications
- Wearable Computer Terminals

BUSINESS SKILLS

- Category Management
- Customer Service Standards
- Leadership Skills
- Time Management

COMMERCIAL SKILLS

- Best Practices
- Computer Controlled Systems
- Electrical System
- Fuel Cells System
- Operating Procedures
- Order Selection Procedures
- Preferred Work Methods

Productive Lab Hours

0-60

COMMERCIAL SKILLS (Ratio 1:3)

- Balers
- Forklifts
- Electric Pallet Jacks
- Order Selection Procedures

- Preferred Work Methods
- Product Handling
- Scissor Lifts
- Scrubbers
- Tractor
- Trailers
- SYGMA Labeling Systems
- Sweeper
- Wearable Computer Terminals

CBT Hours

0 – 14

BUSINESS SKILLS

- Customer Service Training For Drivers (.25)
- Customer Service in the Field (1)
- Customer Service Processes and Procedures (3)
- Customer Service Confrontation and Conflict (1)
- Customer Service Over the Phone (1)
- Customer Interactions (3.5)
- Customer Service Fundamentals: Building Rapport in Customer Relationships (1)
- Quality Customer Service (.75)
- Internal Customer Service (1)

CONTINUOUS IMPROVEMENT

- Business Coaching: Build the Coaching Relationship (1)

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. CBT is capped at 50% of total training hours. PL is capped at 60 hours per-trainee.



Training Proposal for:
Tulare Joint Union High School District
dba Tulare Adult School
Agreement Number: ET18-0102

Panel Meeting of: June 23, 2017

ETP Regional Office: Sacramento

Analyst: K. Smiley

PROJECT PROFILE

Contract Attributes:	CNA to LVN Priority Rate HUA	Industry Sector(s):	Healthcare Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Tulare	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	≤0%		

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
\$171,000		\$11,894 8%		\$182,894

In-Kind Contribution:	50% of Total ETP Funding Required	Inherent
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee	Commercial Skills, Computer Skills	19	8-600	0	\$9,626	\$22.04
				Weighted Avg: 500			

Minimum Wage by County: \$22.04 per hour for Tulare County.

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

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

Participating employers may use up to \$1.67 per hour in employer paid health benefits (medical, dental and vision) to meet the Post-Retention Wage of \$22.04 for Tulare County.

Wage Range by Occupation

Occupation Titles	Wage Range	Estimated # of Trainees
Licensed Vocational Nurse	\$20.37 - \$37.75	19

INTRODUCTION

Tulare Joint Union High School District dba Tulare Adult School, (Tulare Adult School), located in Tulare, was founded in 1968. The institute provides vocational skills and General Education Diploma (GED) prep classes to adult students throughout Tulare County. The Tulare Adult School developed their Licensed Vocational Nurse (LVN) program to address the Central Valley's nursing shortage and has graduated over 89 LVN's since the program's inception in 2006. This will be Tulare Adult School's second ETP agreement in the last five years.

The Tulare Adult School's current LVN program provides a curriculum approved by the Bureau of Vocational Nursing and Psychiatric Technicians (BVNPT). The LVN program is designed for the working adult who may not be able to attend school full-time. The school structures its LVN program to provide instruction 3 days a week over an 18-month period.

Under its Certified Nursing Assistant (CNA) to LVN program, ETP may fund licensed nurse training for individuals who (1) are currently working as certified nurse assistants/caregivers in a health facility; (2) are enrolled in an accredited nurse training program to become an LVN; and (3) have completed the first 800 hours of the nurse program (by the time of ETP) approval. (UI Code Section 10214.9)

Training is center-based and will be located at Tulare Adult School.

PROJECT DETAILS

All accredited LVN training programs consist of at least 1,530 training hours: 576 theory hours and 954 clinical hours. The ETP-funded portion will consist of up to 300 hours of theory and 450 clinical hours for total of 750 hours. The theory hours will be delivered in a classroom setting. The clinical hours will be delivered in a laboratory setting at the training provider's facility or at a local health care facility.

Tulare County is designated as a Registered Nurse Shortage Area (RNSA), by the State of California. Assisted living and rehabilitation communities face the most barriers in attracting and keeping nurses in the Tulare area. Tulare Adult School developed their LVN program to address these barriers and to help alleviate the nursing shortage. Training offered through their LVN program gives trainees the skills and support to transition into nursing and find permanent employment.

This Agreement will also focus on the Computer Skills needed to be successful in the healthcare field. In recent years, the healthcare industry has transitioned to computerized systems for patient registration, charting, and treatment plan development. Tulare Adult School will provide trainees with the necessary Computer Skills training to ensure that they will be immediately successful in their transition to a LVN career.

Tulare Adult School's current LVN program has 30 trainees enrolled, however, the school is only requesting funding for 19 of the 30 trainees to ensure that they will earn 100% of the Agreement amount. The 30 trainees currently registered have all completed the first 800 hours of training. All are expected to complete the remaining training and will be placed into full time permanent positions as a LVN.

CNA to LVN

ETP will fund training for 19 Certified Nursing Assistants trainees in Licensed Vocational Nurse skills in Job Number 1.

Under the CNA to LVN program, the trainees in Job Number 1 may receive training whereby they observe skills being performed hands-on by a Tulare Adult School instructor, and perform those skills themselves under close supervision of the instructor.

These trainees may also receive clinical training by a Tulare Adult School instructor as required for licensure by the state Board of Vocational Nursing and Psychiatric Technicians. Payment for all training in Job Number 1 will be at the Medical Skills or Class/Lab reimbursement rate.

The trainer-to-trainee ratio for clinical training is typically lower than standard ETP Class/Lab ratio of 1:20. All clinical training in Job Number 1 must meet standards set by the state Board of Vocational Nursing and Psychiatric Technicians.

Retention

Retention may begin as soon as the ETP trainee is authorized to work as an LVN.

Commitment to Training

Tulare Adult School represents that ETP funds will not displace the existing financial commitment to training of participating employers. Tulare Adult School anticipates that the opportunity for enhanced training made possible by ETP funds will encourage an ongoing financial commitment in this area.

Trainees will be enrolled in an accredited LVN training program while on staff as CNAs with an eligible employer and will have completed the first 800 hours of the training program prior to participating in ETP-funded training. The Panel will fund up to 750 hours of the remaining program. (The minimum hour requirement for LVN training is 1,530 hours; thus, the Panel will essentially fund the last half of the training program.)

High Unemployment Area

The 19 trainees work in a High Unemployment Area (HUA). This is a region with unemployment exceeding the state average by 15%, under the Panel's standards at Title 22, CCR, Section 4429(b). The determination of HUA status is based on unemployment data from the Labor Market Information Division of the Employment Development Department. The company's locations in Tulare County qualify for HUA status under these standards.

However, Tulare Adult School is not asking for a wage modification.

Marketing and Support Costs

Tulare Adult School is seeking support costs of up to 8% for this project. Staff provides trainee assistance in passing their required NCLEX examination for vocational nursing. Examination support may take weeks or months, depending on the trainee. Tulare Adult School staff must market the program to employers and CNA's as well as continue contract support to ensure that the trainees pass the NCLEX examination, are placed with an eligible employer and complete retention.

Training Plan

Trainees will receive training delivered using the class/lab delivery method. Each trainee may receive up to 600 hours of training under this Agreement. Reimbursement will be at the \$18 per hour rate for Priority Industry.

Computer Skills (5%): Training will be provided to all CNA's in the LVN program to ensure that trainees can properly use various programs required in the Healthcare industry. Topics will include Elsevier Evolve Software, Siemens Software and Cerner Software.

Commercial Skills (95%): Training will be provided to the 19 CNA's in the LVN program to enhance trainees' clinical and leadership skills. Topics will include Nursing Fundamentals, Nursing Processes and Leadership to ensure trainees have the skills to properly communicate with patients and staff as well as lead healthcare teams.

Impact/Outcome

The purpose of Tulare Adult School's LVN program is prepare students to take the NCLEX exam and become licensed with the state of California. The program follows the curriculum set by the NCLEX and ensures trainees receive the 1,530 hours of clinical and class/lab instruction required for licensure.

Tuition Reimbursement

Students will not be charged tuition, fees, or any other costs for the ETP-funded portion of their training. The representation will be made a condition of the Agreement.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET12-0172	Tulare	11/19/2011 – 11/18/2013	\$125,138	\$103,182 (82%)

ET12-0172 - Tulare Adult School did not complete 100% of the contract value due to two trainees not passing the NCLEX exam before the Agreement end date. By not successfully completing the NCLEX exam, these trainees could not be placed into a position as a LVN. Both trainees later passed the exam and secured permanent, full-time LVN positions.

On average, the trainees in ET12-0172, completed 532 hours of training per trainee during the term of the Agreement. The average cost per trainee was \$9,576. The highest number of completed hours by a trainee was 544 hours.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

N/A

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

8-600 Trainees may receive any of the following:

MEDICAL SKILLS - DIDACTIC

- Nursing Fundamentals
- Pharmacology
- Nutrition
- Gerontological Nursing
- Psychology-Mental Health Nursing
- Maternity Nursing
- Growth and Development
- Pediatric Nursing
- Communicable Diseases
- Nursing Process
- Anatomy and Physiology
- Patient Education

MEDICAL SKILLS – PRECEPTER

- Medical Surgical-Integumentary
- Medical-Surgical-Cardiovascular
- Medical-Surgical-Respiratory
- Medical-Surgical-Genitourinary
- Medical-Surgical-Musculoskeletal
- Medical-Surgical-Gastrointestinal
- Medical-Surgical-Neurosensory
- Medical-Surgical-Endocrine
- Rehabilitation Nursing

COMMERCIAL SKILLS

- Leadership
- Communication

COMPUTER SKILLS

- Elsevier Evolve Software
- Seimens Software
- Cerner Software
- Max Software
- Omnicell Software

Note: Reimbursement for retraining is capped at 750 total training hours per trainee, regardless of the method of delivery.

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Tulare Joint Union High School District
dba Tulare Adult School

CCG No.: ET18-0102

Reference No: 16-0121

Page: 1 of 2

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Altura Healthcare

Address: 1101 N Cherry

City, State, Zip: Tulare, CA 93274

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 750

Total # of full-time company employees in California: 750

Company: Healthcare Conglomerate Associated (HCCA) Tulare Regional Medical Center

Address: 689 North Cherry

City, State, Zip: Tulare, CA 93274

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 1025

Total # of full-time company employees in California: 1025

Company: Kaweah Delt Healthcare District

Address: 400 W. Mineral King

City, State, Zip: Tulare, CA 93274

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 1523

Total # of full-time company employees in California: 1523

Company: Magnolia Health - Merritt Manor

Address: 604 E. Merritt

City, State, Zip: Tulare, CA 93274

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 7

Total # of full-time company employees worldwide: 125

Total # of full-time company employees in California: 125

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Tulare Joint Union High School District
dba Tulare Adult School

CCG No.: ET18-0102

Reference No: 16-0121

Page: 2 of 2

Company: Magnolia Health - Twin Oaks

Address: 1897 North M Street

City, State, Zip: Tulare, CA 93274

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 225

Total # of full-time company employees in California: 225



TRAINING PROPOSAL FOR
Ultra Pro International LLC
17- 0648

Panel Meeting Date: 06/23/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Romero, Jela
Type of Proposal: Single Employer Contract (SE)
Funding Source: Out-of-State Competition (OSC)

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$123,600.00			
Program & Admin Cost	Support Cost	Substantial Contribution (\$ / %)	Total In-Kind
\$123,600.00	N/A	N/A	\$118,281.00

APPLICANT PROFILE

<i>Company Summary</i>	Ultra Pro International, LLC (Ultra Pro) is a manufacturer and supplier of various storage solutions products that store and protect investment grade gaming, sports and creative memorabilia.
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<i>Industry Sector(s)</i>	list, separate with comma if more than one
<i>Priority Industry</i>	Yes
<i>No. of Employees (Applicant)</i>	State: 115 US: 115 World Wide: 115
<i>Turnover Rate (Applicant)</i>	5.00%.
<i>Repeat Contractor</i>	Yes
<i>High Unemployment Area</i>	Yes
<i>Unions</i>	None

TRAINING PROFILE

Training Objective	Train employees in newly acquired equipment and software.
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Training is summarized below. Additional details are provided in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# of Trainees	Reimbursement Rate	Avg. Hours	Cost Per Trainee	Min – Max Hour
1	Retrainees	110	\$18.00	60	\$1,080	8 - 200
2	Retrainee, Job Creation	4	\$20.00	60	\$1,200	8 - 200
	Total:	114				

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details on the proposed Training Project.

1. Company Background

Founded in 1952, Ultra Pro is a family-owned company located in the City of Commerce that manufactures and supplies various storage solutions for photographs, photofinishing products and sports and gaming collectibles. Ultra Pro's products include albums, portfolios, deck boxes, protectors, scrapbooks, refill pages and chip holders. The Company's multimedia product line also features storage accessories for images, music and multimedia CD's. These products and are sold through a network of distributors and retailers both inside and outside of the United States. Ultra Pro's customers include key retailers like Amazon, Barnes & Noble, Hot Topic, Walmart and MarMAxx.

2. Current Training Project Details

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

Purpose of Training	<p>Ultra Pro seeks funding to provide training to remain competitive in the market and to respond to increased product demand created by its recent expansion to the Latin America, and Southeast Asian markets. The expanded sales channels also led to an investment in a new game publishing division that is expected to become a significant contributor to the Company's overall business. In response, Ultra Pro recently bought and installed several pieces of equipment needed in its production process, namely an oil drum heat press for large format play mats, two new turntables for 3-ring binders and a pre-sealed portfolio production. It also launched its Customer Relationship Management (CRM) software that will be utilized by the whole company.</p> <p>For this ETP proposal, Ultra Pro will train its employees on new equipment operation processes and on the new CRM software. Training will provide employees skills to work effectively and competently using new processes and gain knowledge and proficiency to safely operate new equipment. Significant training and cross-training is needed to ensure that the workforce is ready to operate and produce acceptable products from these new machines and product lines. The expanded production capabilities allow Ultra Pro to accept and process larger orders with more frequency.</p>
Training	Ultra Pro has retained the services of Training Funding Source for administration of

Infrastructure and Administrative Plan	the ETP project and the Company's Human Resources Manager will oversee all other aspects including scheduling training and ensuring training completion is documented for ETP reimbursement.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Sample Curriculum

Provided below is a summary of the methods by which training will be delivered including a sample of the courses that will be offered.

Each of the Trainee groups will be able to take courses under the various delivery methods.

Delivery Method	Classroom/Simulated Laboratory
Training Type/Level	Sample Classes
Business Skills	Supply Chain Management
	Retail Marketing and Brand Promotion
Computer Skills	Write Project Management Software
	Customer Relationship Management (CRM) software
Continuous Improvement	Lean Manufacturing
	Quality and Process Improvement
Manufacturing Skills	Equipment/Machine Operation
	Packaging Methods and Processes
Hazardous Materials	GHS (Global Harmonized System)

4. Additional Company or Training Project Details

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

4.1 Program Waivers

The next table lists the various waivers and supporting justifications for training that apply to this proposed Training Project.

Waivers/Justification Type	Summary
High Unemployment Area (HUA)	Ultra Pro is requesting a wage modification to \$12.72 to reach the entry level workers in Production, Business and Financial Operations.

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost
Development	Training Funding Source		\$6,900.00
Administrative	Training Funding Source		13%
Training	None to date		

4.3 Previous ETP Project Summary

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

Past Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance %
ET15-0476	Commerce	06/12/15 – 06/11/17	\$49,920	\$49,920	100%
ET13-0248	Commerce	12/19/12 – 12/18/14	\$99,320	\$99,320	100%

4.4 Supporting Panel Proposal Documentation

Attachments 1, 2 and 3 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 1 – Group and Job Title Details

The proposed Training Project includes training for the following Trainees, organized by training group.

Group #: 1 – Retrainees				
County		ETP Minimum Wage		
Los Angeles County		\$16.96		
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post-Retention Wage
Los Angeles County				
Admin	34	\$11.00 - \$40.00	\$1.85	\$12.72
Engineering	3	\$18.00 - \$43.00	\$0.00	\$18.00
Production	54	\$11.00 - \$25.00	\$1.85	\$12.72
Supervisor/Manager	19	\$19.00 - \$47.00	\$0.00	\$19.00

Group #: 2 – Retrainees, Job Creation				
County		ETP Minimum Wage		
Los Angeles County		\$10.60		
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post-Retention Wage
Los Angeles County				
Production JC	4	\$11.00 - \$40.00	\$1.85	\$10.60

Attachment 2 – Training Delivery and Curriculum Listing

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

<i>Delivery Method/Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type/Level	Planned Course Offerings
<i>Business Skills</i>	
	Product and Service Knowledge
	Retail Marketing and Brand Promotional Skills
	Standard Operating Procedures
	Supply Chain Management
<i>Computer Skills/Standard</i>	
	Customer Relationship
	Write
	Vendor Manuals
<i>Continuous Improvement Skills</i>	
	Lean Manufacturing
	Process/Quality Improvement
<i>Hazardous Material Skills</i>	
	GHS (Global Harmonized System)
<i>Manufacturing Skills/Standard</i>	
	Equipment/Machine Operations
	Machine Run Rate Improvement
	Multi-Work Center Cross Training
	Oil Drum Procedures
	Packaging Methods and Processes
	PLC (Programmer Logic Controller)

Attachment 3 - Training Project Characteristics Details

Provided in the table are details on the training characteristics.

Characteristic	Program Summary
High Unemployment Area (HUA).	Some of UltraPro's trainees work in a High Unemployment Area (HUA). This is a region with unemployment exceeding the state average by 15%. For these trainees the post retention wage may be modified by up to 25% below the New Hire ETP minimum wage.
Retrainee - Job Creation Retrainee Program	<p>The Panel incentivizes job creation. Training for newly-hired employees is reimbursed at a higher rate, and trainees are subject to a lower post-retention wage. The date of hire for trainees is within the three-month period before contract approval, or within the term of the contract. Trainees are hired into "net new jobs" as a condition of contract. Substantial Contribution and Turnover Rate penalty requirements do not apply.</p> <p>Employer must demonstrate expanded or new facilities, new equipment or machinery, expanded business capacity or other measureable investment in hiring workers and expanding their California workforce. A trainee whose employment is "Temp-to-Permanent", "seasonal", or "part-time" may be considered newly-hired, but employment retention cannot begin until trainee is a permanent full-time employee on Contractor payroll.</p>



Panel Amendment #1 Proposal for:
Virgin Galactic, LLC
Agreement Number: ET16-0377

Amendment Effective Date: March 27, 2017

Panel Meeting of: June 23, 2017

ETP Regional Office: North Hollywood

Analyst: L. Vuong

CURRENT PROJECT PROFILE

Contract Type:	Priority/Retrainee Job Creation HUA Veterans	Industry Sector(s):	Engineering Manufacturing
Counties Served:	Los Angeles, Kern	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Priority Industry:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Current Contract Term:	March 21, 2016 to March 20, 2018	Substantial Contribution:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

CURRENT FUNDING

Current Funding
\$247,200

AMENDMENT FUNDING

Requested Funding	Total Funding
+\$99,050	\$346,250

AMENDMENT TRAINING PLAN TABLE

Job No.	Job Description (By Contract Type)	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Priority Rate Retrainee	Adv. Tech., Business Skills, Computer Skills, Cont. Imp., HazMat, Mfg. Skills	175	8-200	0	\$1,116	*\$15.60
				Weighted Avg: 62			
2	Priority Rate Retrainee Job Creation	Adv. Tech., Business Skills, Computer Skills, Cont. Imp., HazMat, Mfg. Skills	100	8-200	0	\$1,240	*\$12.77
				Weighted Avg: 62			
3	Prioriyt Rate Retrainee Veterans	Adv. Tech., Business Skills, Computer Skills, Cont. Imp., HazMat, Mfg. Skills	35	8-200	0	\$770	*\$12.77
				Weighted Avg: 35			

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

Minimum Wage by County: Job Number 1: \$16.48 per hour for Los Angeles County and \$15.60 per hour for Kern County

Job Number 2 (Job Creation): \$13.73 per hour for Los Angeles County and \$12.77 for Kern County

Job Number 3 (Veterans): \$13.73 per hour for Los Angeles County and \$12.77 for Kern County

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

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

Up to \$1.98 per hour for Job Number 1 and up to \$0.73 per hour for Job Numbers 2 and 3 may be used to meet the Post-Retention Wage.

Wage Range by Occupation	
Occupation Title	Wage Range
Job Number 1	
Support Staff	\$17.00 - \$47.00
Manufacturing Staff/Technician	\$14.50 - \$44.00
Engineering Design/Information Technology Staff	\$19.00 - \$48.56
Sr. Engineering Design/Information Technology Staff	\$48.57 - \$78.50
Supervisor/Manager	\$37.81 - \$67.02

Job Number 2 (Job Creation)	
Support Staff	\$13.00 - \$42.00
Manufacturing Staff/Technician	\$13.00 - \$42.00
Engineering Design/Information Technology Staff	\$18.00 - \$48.00
Sr. Engineering Design/Information Technology Staff	\$38.00 - \$68.00
Supervisor/Manager	\$35.00 - \$65.00
Job Number 3 (Veterans)	
Support Staff	\$13.00 - \$42.00
Manufacturing Staff/Technician	\$13.00 - \$42.00
Engineering Design/Information Technology Staff	\$18.00 - \$48.00
Sr. Engineering Design/Information Technology Staff	\$38.00 - \$68.00
Supervisor/Manager	\$35.00 - \$65.00

INTRODUCTION

Virgin Galactic, LLC (Virgin Galactic) (www.virgingalactic.com) designs, develops and manufactures commercial spaceships, carrier aircrafts and small satellite launch rockets. Headquartered in New York, Virgin Galactic has four facilities in California (one in Long Beach and three in Mojave). Funding under this Agreement includes a close affiliate, The Spaceship Company, LLC (TSC) (www.thespaceshipcompany.com). TSC is co-located in the same facilities, and provided the same type of manufacturing. This is Virgin Galactic's first ETP Agreement.

AMENDMENT DETAILS

The initial training plan was conservative and funds have almost been depleted with more training needed. Virgin Galactic is requesting additional ETP funding of \$99,050. The additional funding will allow current trainees to cover a full range of manufacturing skills and keep up with changes in technology.

The Company requests to increase the weighted average hours of training from 35 to 62 for Job Number 1; and from 55 to 62 for Job Number 2. This will allow current trainees to receive more training under the Job Numbers they are currently enrolled in. This Amendment would increase amount by \$99,050 from \$247,200 to \$346,250.

Since there are six months remaining in the contract term and the Company has shown performance, Virgin Galactic is requesting a retroactive effective date to March 27, 2017. This is the date the request was submitted, which reflects the date on which the Company had exhausted funds.

Trainees are going through an aggressive training plan, including daily classes (8 hours per day, 5 days per week). There are no new trainees, and no changes to curriculum or trainee wages.

RECOMMENDATION

Staff recommends approval of this Amendment.

CURRENT CONTRACT PERFORMANCE

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

Agreement No.	Approved Amount	Term	No. Trainees Enrolled	No. Completed Training	No. Retained
ET16-0377	\$247,200	03/21/16 – 03/20/18	838	TBD	TBD

ET16-0377: Based on ETP Systems, 838 trainees have enrolled, and 759 trainees are still in training. The ETP Online Tracking System shows a total of 16,826 eligible hours for potential earnings of \$317,750 (128% of approved amount).

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

8-200

Trainees may receive any of the following:

ADVANCED TECHNOLOGY

- Advanced Aerospace/Aircraft Design
- Advanced Design Project Management and Processes
- ANSYS Engineering Software
- CAD/CAM Design Software for Components and Structures
- Computer Aided Three-dimensional Interactive Application (CATIA)
- Composites Fabrication
- Computational Fluid Dynamics
- Computer Maintenance Management System (CMMS)
- Configuration Management
- Cryogenic Engineering and Safety
- Data Acquisition/Data Management System
- Database Administrator Skills (Includes Development, Performance, Tuning)
- Design Review
- Engineering Methods/Processes
- Enterprise Resource Planning (ERP) System Design and Implementation
- Finite Element Modeling And Postprocessing (FEMAP) Software
- Finite Element/ Flight Dynamics Modeling
- Flight Sciences/Technology/Software Skills
- Handling Qualities/Performance
- Mass Properties
- Mechanical Design
- Metal Part Design
- Non-destructive Testing
- Software Design and Programming
- Software Testing and Automation
- Solidworks CAD Software
- Structured Query Language (SQL)

BUSINESS SKILLS

- Accountability Skills
- Business Acumen
- Business/Technical Writing Skills
- Communication Skills
- Conflict Resolution Skills
- Customer Service/Support Skills
- Effective Meeting Management
- Finance/Accounting Skills
- Goal Setting/Motivation Skills
- Inventory Management Skills
- Logistics/Supply Chain Skills
- Marketing/Sales Skills

- Metrics Management
- Presentation Skills
- Preventative Maintenance Skills
- Product Knowledge
- Scheduling Skills
- Train the Trainer Skills

Individuals with Disabilities

- Accessibility
- Disability Culture: Sensitivity, Awareness, and Hiring Practices
- Skills Development for People with Disabilities

COMPUTER SKILLS

- Digital Literacy Skills
- HRIS System Skills
- Intermediate/Advanced Microsoft Office Skills
- Inventory Control Skills
- Learning Management System Skills
- NX Teamcenter Software Skills
- Oracle System Skills
- Quality System Skills
- Ultipro Software Skills
- Ultramain Software Skills
- Virgin Galactic Proprietary System Skills
- Web Application Skills

CONTINUOUS IMPROVEMENT

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

HAZARDOUS MATERIALS

- Hazard Analysis & Critical Control Point (HACCP)
- Hazardous Communication Skills
- High-Voltage Electronics
- Toxic and Hazardous Substances

MANUFACTURING SKILLS

- Advanced Safety Skills
 - Crane Safety
 - Electrical Safety
 - Environmental Control
 - Ground Operations
 - Ground Operations
 - Motorized Vehicle and Mechanized Equipment
 - Tools, Machinery and Machine Guarding
 - Welding, Cutting and Brazing
- Aerospace Manufacturing Skills
- Aircraft Structures/Operation/Assembly
- Aircraft Systems Integration
- CNC Machine Operation
- CNC Programming
- Cross-Functional Equipment/Production Skills
- Forklift/Forktruck Skills
- Gauges/Calibration
- Geometric Dimension and Tolerances (GD&T)
- Good Manufacturing Practices
- Inspection/Integration
- Manufacturing/Technical Process Skills
- Manufacturing Best Practices/Process Improvements
- Manufacturing Testing skills
- Production Equipment and Tools/Preventative Maintenance

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

CBT Hours

0-200

BUSINESS SKILLS

- Basics of Manufacturing Costs 140 (1.5 hours)
- Conflict Resolution for Different Groups 155 (1.5 hours)
- Conflict Resolution Principles 150 (1.5 hours)
- Essentials of Communication 120 (1.5 hours)
- Intro to Managerial Accounting 145 (1.5 hours)

CONTINUOUS IMPROVEMENT

- Essentials of Leadership 110 (1.5 hours)
- Managing Performance: Best Practices 130 (1.5 hours)
- Managing Performance: Corrective Actions 135 (1.5 hours)
- Team Leadership 160 (1.5 hours)

MANUFACTURING SKILLS**Adhesives**

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

Coatings

- Coating Defects 150 (1.5 hours)
- Intro to Coating Composition 110 (1.5 hours)
- Processes for Applying Coatings 140 (1.5 hours)
- Surface Preparation for Coatings 120 (1.5 hours)
- Troubleshooting Coating Defects 170 (1.5 hours)

Composites

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

Computer Numerical Control

- Basics of the CNC Machining Center 130 (1.5 hours)
- Basics of the CNC Swiss-Type Lathe 135 (1.5 hours)
- Basics of the CNC Turning Center 120 (1.5 hours)
- CAD/CAM Overview 160 (1.5 hours)
- Canned Cycles 310 (1.5 hours)
- CNC Coordinates 140 (1.5 hours)
- CNC Manual Operations 200 (1.5 hours)
- CNC Offsets 210 (1.5 hours)
- CNC Specs for the Lathe 225 (1.5 hours)
- CNC Specs for the Mill 220 (1.5 hours)
- Creating a Mazatrol Program for the Lathe 289 (1.5 hours)
- Creating a Mazatrol Program for the Mill 288 (1.5 hours)
- Creating a Milling Program 290 (1.5 hours)
- Creating a Turning Program 280 (1.5 hours)
- Creating an EIA/ISO Program for the Mazak (1.5 hours)
- Creating an EIA/ISO Program for the Mazak (1.5 hours)
- GE Fanuc Lathe: Control Panel Overview 255 (1.5 hours)
- GE Fanuc Lathe: Entering Offsets 265 (1.5 hours)
- GE Fanuc Lathe: First Part Runs 325 (1.5 hours)

- GE Fanuc Lathe: Locating Program Zero 275 (1.5 hours)
- GE Fanuc Lathe: Program Execution 285 (1.5 hours)
- GE Fanuc Lathe: Program Storage 315 (1.5 hours)
- GE Fanuc Mill: Control Panel Overview 250 (1.5 hours)
- GE Fanuc Mill: Entering Offsets 260 (1.5 hours)
- GE Fanuc Mill: First Part Runs 320 (1.5 hours)
- GE Fanuc Mill: Locating Program Zero 270 (1.5 hours)
- GE Fanuc Mill: Program Execution 280 (1.5 hours)
- GE Fanuc Mill: Program Storage 310 (1.5 hours)
- Haas Lathe: Control Panel Overview 255 (1.5 hours)
- Haas Lathe: Entering Offsets 265 (1.5 hours)
- Haas Lathe: First Part Runs 325 (1.5 hours)
- Haas Lathe: Locating Program Zero 275 (1.5 hours)
- Haas Lathe: Program Execution 285 (1.5 hours)
- Haas Lathe: Program Storage 315 (1.5 hours)
- Haas Mill: Control Panel Overview 250 (1.5 hours)
- Haas Mill: Entering Offsets 260 (1.5 hours)
- Haas Mill: First Part Runs 320 (1.5 hours)
- Haas Mill: Locating Program Zero 270 (1.5 hours)
- Haas Mill: Program Execution 280 (1.5 hours)
- Haas Mill: Program Storage 310 (1.5 hours)
- History and Definition of CNC 100 (1.5 hours)
- Lathe 287 (1.5 hours)
- Mazak Lathe: Control Panel Overview 255 (1.5 hours)
- Mazak Lathe: Entering Offsets 285 (1.5 hours)
- Mazak Lathe: First Part Runs 325 (1.5 hours)
- Mazak Lathe: Locating Program Zero 275 (1.5 hours)
- Mazak Lathe: Program Execution 295 (1.5 hours)
- Mazak Lathe: Program Storage 315 (1.5 hours)
- Mazak Lathe: Safety for the Lathe 265 (1.5 hours)
- Mazak Mill: Control Panel Overview 250 (1.5 hours)
- Mazak Mill: Entering Offsets 280 (1.5 hours)
- Mazak Mill: First Part Runs 320 (1.5 hours)
- Mazak Mill: Locating Program Zero 270 (1.5 hours)
- Mazak Mill: Program Execution 290 (1.5 hours)
- Mazak Mill: Program Storage 310 (1.5 hours)
- Mazak Mill: Safety for the Mill 260 (1.5 hours)
- Mechanics of CNC 110 (1.5 hours)
- Mill 286 (1.5 hours)
- Milling Calculations 295 (1.5 hours)
- Part Program 150 (1.5 hours)
- Turning Calculations 285 (1.5 hours)
- Electrical Power
 - AC Fundamentals 210 (1.5 hours)
 - AC Power Sources 235 (1.5 hours)
 - Battery Selection 250 (1.5 hours)
 - Conductor Selection 240 (1.5 hours)
 - DC Circuit Components 140 (1.5 hours)
 - DC Power Sources 230 (1.5 hours)
 - Electrical Instruments 220 (1.5 hours)

- Electrical Print Reading 225 (1.5 hours)
- Electrical Units 110 (1.5 hours)
- Intro to Circuits 120 (1.5 hours)
- Intro to Magnetism 130 (1.5 hours)
- NEC Overview 150 (1.5 hours)
- Parallel Circuit Calculations 205 (1.5 hours)
- Safety for Electric Work 115 (1.5 hours)
- Series Circuit Calculations 200 (1.5 hours)

Fasteners

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

Hydraulics and Pneumatics

- Actuator Applications 240 (1.5 hours)
- Basic Hydraulic Circuit Design 310 (1.5 hours)
- Basic Pneumatic Circuit Design 315 (1.5 hours)
- Contamination and Filter Selection 330 (1.5 hours)
- Fittings for Fluid Systems 135 (1.5 hours)
- Fluid System Print Reading 220 (1.5 hours)
- Hydraulic Control Valves 230 (1.5 hours)
- Hydraulic Fluid Selection 320 (1.5 hours)
- Hydraulic Power Sources 210 (1.5 hours)
- Hydraulic Power Variables 200 (1.5 hours)
- Hydraulic Principles and System Design 340 (1.5 hours)
- Intro to Fluid Conductors 130 (1.5 hours)
- Intro to Fluid Systems 100 (1.5 hours)
- Intro to Hydraulic Components 120 (1.5 hours)
- Intro to Pneumatic Components 125 (1.5 hours)
- Pneumatic Control Valves 235 (1.5 hours)
- Pneumatic Power Sources 215 (1.5 hours)
- Pneumatic Power Variables 205 (1.5 hours)
- Preventive Maintenance for Fluid Systems 140 (1.5 hours)
- Safety for Hydraulics and Pneumatics 105 (1.5 hours)
- The Forces of Fluid Power 110 (1.5 hours)

Inspection Skills

- Basic Measurement 110 (1.5 hours)
- Basics of the CMM 120 (1.5 hours)
- Basics of the Optical Comparator 130 (1.5 hours)
- Calibration Fundamentals 210 (1.5 hours)
- Hardness Testing 260 (1.5 hours)
- Hole Inspection 240 (1.5 hours)
- Inspecting with CMMs 220 (1.5 hours)
- Inspecting with Optical Comparators 230 (1.5 hours)

- Interpreting GD&T 310 (1.5 hours)
- Intro to GD&T 200 (1.5 hours)
- Linear Instrument Characteristics 115 (1.5 hours)
- Measuring System Analysis 300 (1.5 hours)
- Overview of Threads 150 (1.5 hours)
- Surface Measurement 140 (1.5 hours)
- Thread Inspection 250 (1.5 hours)

Manufacturing Process Skills

- Basics of the Engine Lathe 115 (1.5 hours)
- Basics of the Manual Mill 110 (1.5 hours)
- Basics of Tolerance 120 (1.5 hours)
- Benchwork and Layout Operations 210 (1.5 hours)
- Blueprint Reading 130 (1.5 hours)
- Centerless Grinder Operation 260 (1.5 hours)
- Concepts of Calculus 310 (1.5 hours)
- Cylindrical Grinder Operation 250 (1.5 hours)
- Dressing and Truing 230 (1.5 hours)
- Engine Lathe Operation 225 (1.5 hours)
- Geometry: Circles and Polygons 185 (1.5 hours)
- Geometry: Lines and Angles 155 (1.5 hours)
- Geometry: Triangles 165 (1.5 hours)
- Grinding Processes 120 (1.5 hours)
- Grinding Variables 200 (1.5 hours)
- Grinding Wheel Geometry 220 (1.5 hours)
- Grinding Wheel Materials 210 (1.5 hours)
- Holmaking on the Mill 230 (1.5 hours)
- Interpreting Blueprints 230 (1.5 hours)
- Intro to Abrasives 100 (1.5 hours)
- Manual Mill Operation 220 (1.5 hours)
- Math: Fractions and Decimals 105 (1.5 hours)
- Math: Fundamentals 100 (1.5 hours)
- Math: Units of Measurement 115 (1.5 hours)
- Overview of Engine Lathe Setup 205 (1.5 hours)
- Overview of Manual Mill Setup 200 (1.5 hours)
- Setup for Centerless Grinders 320 (1.5 hours)
- Shop Algebra Overview 200 (1.5 hours)
- Shop Geometry Overview 170 (1.5 hours)
- Shop Trig Overview 210 (1.5 hours)
- Statistics 220 (1.5 hours)
- Surface Grinder Operation 240 (1.5 hours)
- Taper Turning on the Engine Lathe 240 (1.5 hours)
- Threading on the Engine Lathe 235 (1.5 hours)
- Trig: Pythagorean Theorem 205 (1.5 hours)
- Trig: Sine Bar Applications 225 (1.5 hours)
- Trig: Sine, Cosine, and Tangent 215 (1.5 hours)
- What Is Grinding? 110 (1.5 hours)

Materials Processing

- Ceramics 250 (1.5 hours)
- Ferrous Metals and Alloys 210 (1.5 hours)

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

Mechanical Systems

- Bearing Applications 210 (1.5 hours)
- Belt Drive Applications 230 (1.5 hours)
- Clutch and Brake Applications 250 (1.5 hours)
- Forces of Machines 110 (1.5 hours)
- Gear Applications 245 (1.5 hours)
- Gear Geometry 240 (1.5 hours)
- Intro to Mechanical Systems 100 (1.5 hours)
- Lubricant Fundamentals 130 (1.5 hours)
- Mechanical Power Variables 200 (1.5 hours)
- Power Transmission Components 120 (1.5 hours)
- Safety for Mechanical Work 105 (1.5 hours)
- Spring Applications 220 (1.5 hours)

Metal Stamping Press/Metalworking

- ANSI Insert Selection 250 (1.5 hours)
- Band Saw Blade Selection 215 (1.5 hours)
- Carbide Grade Selection 230 (1.5 hours)
- Chucks, Collets, and Vises 110 (1.5 hours)
- Clamping Basics 108 (1.5 hours)
- Cutting Fluids 210 (1.5 hours)
- Cutting Processes 140 (1.5 hours)
- Cutting Tool Materials 220 (1.5 hours)
- Cutting Variables 200 (1.5 hours)
- Drill Bushing Selection 230 (1.5 hours)
- Drill Geometry 247 (1.5 hours)
- Fixture Body Construction 200 (1.5 hours)
- Fixture Design Basics 210 (1.5 hours)
- Hard Turning 315 (1.5 hours)
- High-Speed Machining 310 (1.5 hours)
- Intro to Screw Machining 160 (1.5 hours)
- Intro to Workholding 104 (1.5 hours)
- Locating Devices 107 (1.5 hours)
- Machines for Metal Cutting 130 (1.5 hours)
- Machining Titanium Alloys 325 (1.5 hours)
- Metal Removal Processes 110 (1.5 hours)
- Milling Geometry 245 (1.5 hours)

- Optimizing Insert Life 305 (1.5 hours)
- Safety for Metal Cutting 115 (1.5 hours)
- Sawing Fundamentals 155 (1.5 hours)
- Speed and Feed Selection 300 (1.5 hours)
- Supporting and Locating Principles 106 (1.5 hours)
- Tool Geometry 240 (1.5 hours)
- Toolholders for Turning 260 (1.5 hours)
- What Is Cutting? 120 (1.5 hours)

Motor Controls

- AC Motor Applications 240 (1.5 hours)
- Acceleration Methods 385 (1.5 hours)
- Contactors and Motor Starters 250 (1.5 hours)
- Control Devices 260 (1.5 hours)
- DC Motor Applications 230 (1.5 hours)
- Deceleration Methods 380 (1.5 hours)
- Distribution Systems 320 (1.5 hours)
- Electronic Semiconductor Devices 350 (1.5 hours)
- Intro to Electric Motors 200 (1.5 hours)
- Limit Switches and Proximity Sensors 360 (1.5 hours)
- Logic and Line Diagrams 220 (1.5 hours)
- Photoelectric and Ultrasonic Devices 365 (1.5 hours)
- Photonic Semiconductor Devices 355 (1.5 hours)
- Reduced Voltage Starting 370 (1.5 hours)
- Reversing Motor Circuits 310 (1.5 hours)
- Solenoids 235 (1.5 hours)
- Solid-State Relays and Starters 375 (1.5 hours)
- Specs for Servomotors 330 (1.5 hours)
- Symbols and Diagrams for Motors 210 (1.5 hours)
- Timers and Counters 340 (1.5 hours)

Press Brakes

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

Programmable Logic Controllers

- Basic Programming 250 (1.5 hours)
- Basics of Ladder Logic 220 (1.5 hours)
- Data Manipulation 360 (1.5 hours)
- Hand-Held Programmers of PLCs 280 (1.5 hours)
- Hardware for PLCs 210 (1.5 hours)
- Intro to PLCs 200 (1.5 hours)
- Math for PLCs 320 (1.5 hours)
- Networking for PLCs 270 (1.5 hours)
- Numbering Systems and Codes 230 (1.5 hours)
- Overview of PLC Registers 305 (1.5 hours)
- PID for PLCs 350 (1.5 hours)
- PLC Diagrams and Programs 300 (1.5 hours)
- PLC Inputs and Outputs 240 (1.5 hours)

- PLC Installation Practices 340 (1.5 hours)
- PLC Program Control Instructions 310 (1.5 hours)
- PLC Timers and Counters 260 (1.5 hours)
- Sequencer Instructions for PLCs 330 (1.5 hours)
- Shift Registers 370 (1.5 hours)

Quality and Testing

- 5S Overview 155 (1.5 hours)
- Approaches to Maintenance 120 (1.5 hours)
- Approaches to Quality Management 255 (1.5 hours)
- Cell Design and Pull Systems 160 (1.5 hours)
- Conducting an Internal Audit 200 (1.5 hours)
- Conducting Kaizen Events 260 (1.5 hours)
- Effects 182 (1.5 hours)
- Intro to Machine Rigging 110 (1.5 hours)
- Intro to Six Sigma 170 (1.5 hours)
- Intro to Supply Chain Management 140 (1.5 hours)
- ISO 9000 Overview 110 (1.5 hours)
- Lean Manufacturing Overview 130 (1.5 hours)
- Lifting and Moving Equipment 130 (1.5 hours)
- Managing Practices for Total Quality 320 (1.5 hours)
- Metrics for Lean 230 (1.5 hours)
- Process Flow Charting 240 (1.5 hours)
- Quality Overview 100 (1.5 hours)
- Rigging Equipment 120 (1.5 hours)
- Rigging Inspection and Safety 210 (1.5 hours)
- Rigging Mechanics 220 (1.5 hours)
- Six Sigma Goals and Tools 310 (1.5 hours)
- SPC Overview 210 (1.5 hours)
- Strategies for Setup Reduction 250 (1.5 hours)
- Total Productive Maintenance Overview 150 (1.5 hours)
- Troubleshooting: Identifying Problems 180 (1.5 hours)
- Troubleshooting: Taking Corrective Actions 184 (1.5 hours)
- Troubleshooting: Understanding Causes and (1.5 hours)
- TS 16949:2002 Overview 220 (1.5 hours)
- Value Stream Mapping: The Future State 305 (1.5 hours)
- Value Stream Mapping: The Present State 300 (1.5 hours)

Robotics

- Applications for Robots 130 (1.5 hours)
- Concepts of Robot Programming 210 (1.5 hours)
- End Effectors 125 (1.5 hours)
- Industrial Network Integration 260 (1.5 hours)
- Intro to Robotics 110 (1.5 hours)
- Robot Axes 140 (1.5 hours)
- Robot Components 120 (1.5 hours)
- Robot Installations 230 (1.5 hours)
- Robot Maintenance 170 (1.5 hours)
- Robot Safety 115 (1.5 hours)
- Robot Sensors 150 (1.5 hours)
- Robot Troubleshooting 160 (1.5 hours)
- Robotic Control Systems 240 (1.5 hours)

- Robotic Drives, Hardware, and Components 220 (1.5 hours)
- Vision Systems 250 (1.5 hours)

Soldering/Welding

- Arc Welding Aluminum Alloys 310 (1.5 hours)
- Arc Welding Power Sources 260 (1.5 hours)
- Arc Welding Processes 120 (1.5 hours)
- Arc Welding Safety 115 (1.5 hours)
- Arc Welding Symbols and Codes 250 (1.5 hours)
- Coil Handling Equipment 140 (1.5 hours)
- Coil Loading Procedures 250 (1.5 hours)
- Die Components 130 (1.5 hours)
- Die Cutting Variables 200 (1.5 hours)
- Die Setting Procedures 300 (1.5 hours)
- Electrical Power for Arc Welding 140 (1.5 hours)
- Electrode Selection 270 (1.5 hours)
- FCAW Applications 230 (1.5 hours)
- Ferrous Metals for Welding 200 (1.5 hours)
- GMAW Applications 220 (1.5 hours)
- GTAW Applications 240 (1.5 hours)
- Guiding System Components 230 (1.5 hours)
- Intro to Submerged Arc Welding 160 (1.5 hours)
- Lead-Free Soldering 230 (1.5 hours)
- Monitoring Press Operations 220 (1.5 hours)
- Nonferrous Metals for Welding 205 (1.5 hours)
- Overview of Weld Types 130 (1.5 hours)
- Oxyfuel Welding Applications 207 (1.5 hours)
- Oxyfuel Welding Safety 105 (1.5 hours)
- Plasma Cutting 265 (1.5 hours)
- Press Basics 110 (1.5 hours)
- Punch and Die Operations 120 (1.5 hours)
- Safety for Soldering 115 (1.5 hours)
- SAW Applications 255 (1.5 hours)
- SMAW Applications 210 (1.5 hours)
- Solder and Flux Selection 210 (1.5 hours)
- Soldering Applications 200 (1.5 hours)
- Soldering Equipment 130 (1.5 hours)
- Soldering PCBs 220 (1.5 hours)
- Stamping Safety 115 (1.5 hours)
- Stripper System Components 235 (1.5 hours)
- Visual Inspection of Welds 280 (1.5 hours)
- What Is Arc Welding? 110 (1.5 hours)
- What Is Oxyfuel Welding? 100 (1.5 hours)
- What Is Soldering? 110 (1.5 hours)

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. CBT is capped at 100% of total training hours.



**TRAINING PROPOSAL FOR
Cornerstone OnDemand, Inc.
17- 0532**

Panel Meeting Date: 06/23/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Webb, Monique
Type of Proposal: Single Employer Contract (SE)
Funding Source: Out-of-State Competition (OSC)

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$384,596			
Program & Admin Cost	Support Cost	Substantial Contribution (\$ / %)	Total In-Kind
\$384,596	N/A	N/A	\$565,000

APPLICANT PROFILE

Company Summary	Cornerstone OnDemand, Inc. (Cornerstone) is a cloud-based Human Resources solution for companies worldwide to help them recruit, train, and manage their organization. Services include technical consulting, support packages, content services, business consulting, design and build for customized software programs, and implementation services.
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Industry Sector(s)	Custom Computer Programming services
Priority Industry	Yes
No. of Employees (Applicant)	State: <u>600</u> US: <u>1000</u> World Wide: <u>1800</u>
Turnover Rate (Applicant)	5%
Repeat Contractor	No
High Unemployment Area	No
Unions	No

TRAINING PROFILE

**Training
Objective**

Provide training in new cloud based technology services to expand software offerings and improve employee customer service skills.

Training is summarized below. Additional details are provided in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# of Trainees	Reimbursement Rate	Avg. Hours	Cost Per Trainee	Min – Max Hour
1	Retrainees, Job Creation	92	\$20.00	47	\$940	8-200
2	Retrainees	338	\$18.00	49	\$882	8-200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details on the proposed Training Project.

1. Company Background

Founded in 1999, Cornerstone provides customized computer software products to businesses through cloud-based technology. Products may be purchased individually or part of suites/modules focusing on areas such as learning, recruitment, job performance, succession, compensation, management, and analytics. Cornerstone customers include government agencies, hospitals, non-profit organizations, schools, and corporations such as Starwood Hotels & Resorts, Xerox, and Walgreens. This will be the company'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.

<i>Purpose of Training</i>	<p>Cornerstone seeks funding to train staff on new software products and updated cloud based technology offerings. To market Cornerstone products, employees must identify a company's need, and provide it with the best software solution based on their expertise. To remain competitive, Cornerstone has extended its customer base, developing new product lines to meet customer business needs to improve management, facility operations, hiring efforts, human resource tasks, career development, and measurable goals.</p> <p>Sales and Technology Staff will participate in Business and Computer Skills training to ensure workers are capable of following the Company's three-step implementation model (discovery, design, and execution) when working with customers. Employees will learn to assess and understand client needs (discovery), build and recommend solutions (design), and provide implementation assistance by coaching and advising the Company through the process (execution). Trainees will also receive system configuration, integration, customer service, communication, and preparation of user-acceptance testing.</p> <p>Cornerstone's customer base is growing as more businesses become aware of the Company's products and services. To meet demand, the Company will expand business capacity by hiring 92 workers over the duration of this Agreement (Sales, Technology, Human Resource, and Finance Staff). New employees will help the Company provide quality customer service, design new products and computer functions, manage customer base, and drive sales.</p>
<i>Training Infrastructure and Administrative Plan</i>	<p>The Director of Talent Management will manage administration duties such as documenting and scheduling training and meeting with ETP Staff. In addition, Cornerstone has hired Glendale Community College District to provide administrative services. The GCCD representative will be responsible for ETP data entry, enrollment, and other administrative duties as required.</p>
<i>Marketing Plan</i> (MEC Only)	N/A
<i>Support Cost Description</i> (MEC Only)	N/A

Substantial Contribution Description	N/A
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3. Sample Curriculum

Provided below is a summary of the methods by which training will be delivered including a sample of the courses that will be offered.

Each of the Trainee groups will be able to take courses under the various delivery methods.

Delivery Method	Classroom/Simulated Laboratory
Training Type/Level	Sample Classes
Business Skills	Customer Success
	Fostering Innovation
Computer Skills	Programming & Coding- Intermediate to Advanced
	Using Mac Products

4. Additional Company or Training Project Details – Keep all subparagraphs

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

4.1 Program Waivers

The next table lists the various waivers and supporting justifications for training that apply to this proposed Training Project.

Waivers/Justification Type	Summary
N/A	

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost
Development	Glendale Community College District	Glendale	\$0.00
Administrative	Glendale Community College District	Glendale	10%
Training	N/A		

4.3 Previous ETP Project Summary - In this section the tables can be deleted if not needed

The applicant has no previous ETP contracts.

4.4 Supporting Panel Proposal Documentation

Attachments 1, 2 and 3 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 1 – Group and Job Title Details

The proposed Training Project includes training for the following Trainees, organized by training group.

Group #: 1 – Retrainees, Job Creation				
County		ETP Minimum Wage		
Los Angeles County		\$14.13		
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post Retention Wage
Los Angeles County				
JC Finance	7	\$20.34 - \$50.00	\$0.00	\$20.34
JC Human Resources	5	\$18.25 - \$48.00	\$0.00	\$18.25
JC Sales	30	\$19.24 - \$48.00	\$0.00	\$19.24
JC Technology	50	\$20.74 - \$50.00	\$0.00	\$20.74

Group #: 2 – Retrainees				
County		ETP Minimum Wage		
Los Angeles County		\$16.93		
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post Retention Wage
Los Angeles County				
Finance	13	\$20.34 - \$50.00	\$0.00	\$20.34
Human Resources	25	\$18.25 - \$48.00	\$0.00	\$18.25
Sales	75	\$19.24 - \$48.00	\$0.00	\$19.24
Technology	225	\$20.74 - \$50.00	\$0.00	\$20.74

Attachment 2 – Training Delivery and Curriculum Listing

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

Delivery Method	Classroom/Simulated Laboratory
Training Type/Level	Classroom
<i>Business Skills</i>	
	Benchmarking
	Building Successful Teams
	Business Communications
	Business Financial Statements
	Business Process Re-Engineering
	Business Writing
	Capacity Analysis
	Career Mobility
	Change Management
	Coaching and Giving/Receiving Feedback
	Collaboration
	Communicating Effectively
	Communication Skills
	Continuous Process Improvement/Need for Change
	Creating and Building Teamwork
	Customer Service
	Customer Success
	Dealing with Conflict
	Decision Making
	Delegating with Purpose
	Dispute Resolution
	Effective Correction Action
	Engaging & Retaining Talent
	Fostering Innovation
	Goal Setting
	Interpreting and Analyzing Data
	Interviewing Skills
	ISO 9000 Overview
	Leadership Boot Camp 1
	Leadership Boot Camp 2
	Leadership Development Suite
	Leadership Essentials/Leading Others
	Marketing
	Meeting for Results

Attachment 2 – Training Delivery and Curriculum Listing

Delivery Method	Classroom/Simulated Laboratory
Training Type/Level	Classroom
	Motivating Others
	Negotiation Skills
	Organizational Roles and Personality Styles
	Organizing and Setting Goals
	Performance Improvement Through Performance Management
	Performance Management
	Planning
	Presentation Skills
	Problem Solving
	Process Improvement Methodologies
	Process Mapping
	Project Management
	SaaS Business
	Sales Continuous Learning
	Setting Goals & Reviewing Results
	Setting Standards
	Succession Planning Skills
	Taking Ownership
	Team Problem Solving
	Time Management
	Time Management & Delegation
	Time Management & Priority Setting
Computer Skills/Standard	
	Coding
	Confluence
	Email Communication
	Google Suite
	Human Resources Software
	Jira
	Microsoft Excel (Intermediate & Advanced)
	Microsoft Office Suite
	Mobile Devices
	Network Training
	Okta
	Programming and Coding - Intermediate to Advanced
	Salesforce

Attachment 2 – Training Delivery and Curriculum Listing

Delivery Method	Classroom/Simulated Laboratory
Training Type/Level	Classroom
	Slack
	Snagit
	Using Mac Products
	WalkMe
	WebEx
	Zendesk

Attachment 3 - Training Project Characteristics Details

Provided in the table are details on the training characteristics.

Characteristic	Program Summary
Retrainee - Job Creation Retrainee Program	<p>The Panel incentivizes job creation. Training for newly-hired employees is reimbursed at a higher rate, and trainees are subject to a lower post-retention wage. The date of hire for trainees is within the three-month period before contract approval, or within the term of the contract. Trainees are hired into “net new jobs” as a condition of contract. Substantial Contribution and Turnover Rate penalty requirements do not apply.</p> <p>Employer must demonstrate expanded or new facilities, new equipment or machinery, expanded business capacity or other measureable investment in hiring workers and expanding their California workforce.</p>



RETRAINEE - JOB CREATION
Training Proposal for:
Decore-Active Specialties, Inc.
Agreement Number: ET18-0106

Panel Meeting of: June 23, 2017

ETP Regional Office: North Hollywood

Analyst: E. Wadzinski

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative	Industry Sector(s):	Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles, Sacramento	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 625	U.S.:870	Worldwide: 870
<u>Turnover Rate:</u>	5%		
<u>Managers/Supervisors:</u> (% of total trainees)	18%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$334,680		\$25,380 15% (Job #2 only)	\$0		\$309,300

In-Kind Contribution:	100% of Total ETP Funding Required	\$426,937
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Continuous Impr, Mfg Skills, Mgmt Skills	75	8-200	0	\$1,080	*\$16.46
				Weighted Avg: 60			
2	Retrainee Priority Rate	Business Skills, Computer Skills, Continuous Impr, Mfg Skills, Mgmt Skills	140	8-200	0	\$918	*\$16.96
				Weighted Avg: 60			
3	Retrainee Job Creation Initiative Priority Rate	Business Skills, Computer Skills, Continuous Impr, Mfg Skills	60	8-200	0	\$1,600	*\$13.72
				Weighted Avg: 80			

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

Minimum Wage by County: Job Number 1: \$16.46 per hour for Sacramento County and \$16.96 per hour for Los Angeles County; Job Number 2: \$16.96 per hour for Los Angeles County; Job Number 3: \$14.13 per hour for Los Angeles County & \$13.72 per hour for Sacramento County.

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

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

Up to \$4.46 per hour for Job Numbers 1 and 2 and up to \$1.63 per hour for Job Number 3 may be used to meet the Post-Retention Wages.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Numbers 1 and 2 - Retrainee		
Customer Service	\$15.00 - \$22.50	40
Project Coordinators	\$14.00 - \$23.00	5
Production Staff	\$12.50 - \$20.00	160
Administration	\$15.00 - \$25.00	10
IT Staff	\$28.00 - \$54.00	10
Programmers	\$45.00 - \$60.00	15
Sales	\$25.00 - \$35.00	25
Managers	\$30.00 - \$58.00	30
Supervisors	\$23.00 - \$33.00	20

Job Number 3 – Job Creation		
Production Staff	\$12.50 - \$20.00	40
Customer Service	\$15.00 - \$22.50	4
Sales	\$25.00 - \$35.00	3
Administration	\$15.00 - \$25.00	3

INTRODUCTION

Founded in 1965, Decore-Active Specialties, Inc. (Decore) (www.decore.com) is a national manufacturing company in the cabinet making industry. The Company supplies cabinetmakers with custom cabinet doors in 250 styles and with a wide variety of materials. Decore also offers high-quality dovetail and doweled drawer boxes, as well as Deco-form accessories. Its customers include cabinetmakers, contractors, designers, Sears, Granite Transformations, and Home Depot.

Decore has six manufacturing facilities, of which five are located in California (Monrovia, Elk Grove, South El Monte and two in Irwindale) and one in North Carolina. Training in this proposal will be provided to employees at all California facilities.

PROJECT DETAILS

This will be Decore's fourth ETP Agreement; third in the last five years. In the previous ETP Agreement, the Company provided training to help manage growth and improve employee skills. For this proposal, some training may be repeated from the previous Curriculum. However, repeated courses will be delivered to newly-hired staff and employees who did not participate in the previous Agreement. Training will not be duplicated.

To remain competitive and grow in California's manufacturing industry, Decore needs to continuously improve, with emphasis in Lean manufacturing. The cabinet industry is changing from manual driven labor to a more computerized and automated workplace. To that point, Decore recently invested in new production equipment, requiring operators to be adept at programming equipment and utilizing AutoCad for batching and processing.

Decore has also installed new software to improve and support order processing, inventory control, production and delivery times. This software will require workers to fully understand their jobs. Training will allow employees to complete tasks efficiently and provide exceptional internal and external customer service.

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.

Decore's partnership with retailers has increased growth substantially. New business, generated in just the first quarter of 2017 for one major retailer, exceeded \$1,000,000 and will continue to grow. To manage this growth, the Company must expand its business capacity, hiring 60 new employees in production, sales, customer service, and administration (Job Number 3). Trainees

will be hired within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into “net new jobs” as a condition of contract.

Training Plan

Business Skills (10%) - Training will be provided to all occupations. Training will focus on communication skills, product knowledge, planning, and project management. Trainees will learn techniques to work cooperatively, control costs, and effectively solve problems. The focus will be on the newly introduced People Centric including leading through people and developing hungry, humble, smart employees.

Computer Skills (10%) - Training will be provided to all occupations. Training will help staff become more proficient in the use of new business software solutions in the areas of resource planning, inventory control, budgeting, and web applications. Information Technology and Programmers will also receive new software training.

Continuous Improvement (30%) - Training will be provided to all occupations. Training will focus on more advanced process and workflow improvements, team building, decision making and waste reduction. Six Sigma and Lean Manufacturing training will be offered to help workers reduce errors and improve product quality.

Management Skills (10%) – Training will be provided to Managers and Supervisors and is geared at tracking performance trends during the launch of new processes and product lines. Training will help staff recognize potential issues, identify areas in need of attention and address the issues by providing additional training or revising processing structures.

Manufacturing Skills (40%) - Training will be provided to Production Staff, Supervisors and Managers. Trainees will gain the skills and knowledge to operate and maintain current production equipment, ensure product quality, and implement best practices in product manufacturing and shop floor operations. Courses will consist of new equipment training along with cross-training among production cells.

Commitment to Training

ETP funds will not displace the existing financial commitment to training. Decore’s current training budget is approximately \$400,000 for training that includes new employee orientation, basic job skills, anti-harassment/diversity and basic safety training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

Training will commence upon Panel approval. Since the last proposal, Decore has increased their training and development team to six employees. This team, along with oversight from Human Resources, will follow-up to ensure training outlined in this proposal is on track for all locations. Decore has incorporated new efficient administration procedures to help meet ETP program standards, and is committed to the successful execution of training, scheduling, and reporting.

Substantial Contribution

Decore is a repeat contractor with an ETP payment earned in excess of \$250,000 within the past five years at the 4414 North Azusa Canyon Road facility located in Irwindale. Accordingly,

reimbursement for trainees at this Irwindale facility (Job Number 2) will be reduced by 15% to reflect the Company's \$25,380 Substantial Contribution to the cost of training.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET14-0381	Irwindale, Monrovia, Elk Grove	04/28/2014– 04/27/2016	\$424,000	\$310,003 (73%)
ET12-0339	Irwindale, Monrovia, Elk Grove	04/02/2012- 04/01/2014	\$262,440	\$256,031 (98%)
ET11-0176	Irwindale, Monrovia, Elk Grove	04/04/2011- 04/03/2013	\$108,000	*\$0 (0%)

*ET11-0176 – The Company attempted to start a Job Creation project in anticipation of a housing recovery. However, once approved, the Company realized that it was not able to hire and train new staff as business had not picked up. The Company terminated its Agreement in January 2012.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

To Be Determined

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

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- Leadership Development
- Communication Training
- Product Knowledge
- Time Management
- Enterprise Resource System
- People Centric Leadership
- Project Management
- Novatime Time and Attendance Management

COMPUTER SKILLS

- Microsoft AX
- AutoCAD
- Business Software
- Microsoft Office (Intermediate/Advanced)

CONTINUOUS IMPROVEMENT

- Management for Daily Improvement
- Performance Management
- Conflict Management
- Effective Listening
- 5S
- Kaizen (Lean Manufacturing)
- Point Kaizen (Problem Solving)
- Management for Daily Improvement

MANAGEMENT SKILLS (For Managers and Supervisors only)

- Performance Management

MANUFACTURING SKILLS

- Production Equipment Processes, Operation and Maintenance
- New Product Knowledge
- Cross-Training
- Pure Colors
- Finishing School
- Bocci Training

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

Note: Reimbursement for retraining is capped at 200 total hours per trainee, regardless of method of delivery.
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TRAINING PROPOSAL FOR
Procore Technologies, Inc.
17-0725

Panel Meeting Date: 06/23/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Paccerelli, Margarita
Type of Proposal: Single Employer Contract (SE)
Funding Source: Out-of-State Competition (OSC)

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$899,728.00			
Program & Admin Cost	Support Cost	Substantial Contribution (\$ 0%)	Total In-Kind
\$899,728.00	N/A	N/A	\$1,300,000.00

APPLICANT PROFILE

<i>Company Summary</i>	<p>This is a Critical Proposal developed in conjunction with the Governor's Office of Economic and Business Development (GO-Biz).</p> <p>Procore Technologies, Inc. (Procore) is a construction management software company. With an award-winning suite of project management tools, over a million registered Procore users across the globe manage all types of construction projects including industrial plants, office buildings, apartment complexes, university facilities and retail centers.</p>
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<i>Industry Sector(s)</i>	Information Technology
<i>Priority Industry</i>	Yes
<i>No. of Employees (Applicant)</i>	State: <u>615</u> US: <u>784</u> World Wide: <u>795</u>
<i>Turnover Rate (Applicant)</i>	0%.
<i>Repeat Contractor</i>	Yes
<i>High Unemployment Area</i>	No
<i>Unions</i>	No

TRAINING PROFILE

<i>Training Objective</i>	Provide training designed to enhance Procore's competitiveness in the industry by putting the Company in an optimal position to ensure employees are performing their best in current roles and to gain new skills to take on new projects and opportunities.
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Training is summarized below. Additional details are provided in *Appendix A - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# of Trainees	Reimbursement Rate	Avg. Hours	Cost Per Trainee	Min – Max Hour
1	Retrainees	577	\$18.00	48	\$864	8-200
2	Retrainees, Job Creation	340	\$20.00	59	\$1,180	8-200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details on the proposed Training Project.

1. Company Background

Founded in 2007 and headquartered in Carpinteria, Procore provides construction management software for the construction industry worldwide. Its mission is to provide construction professionals with the most comprehensive and easy-to-use project management platform combined with industry leading customer service. The Company helps users increase project efficiency and accountability by streamlining and mobilizing project communication and documentation. This real time data and accessibility minimizes costly risks and delays, which ultimately boosts profits.

2. Current Training Project Details

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

<i>Purpose of Training</i>	<p>Procore seeks funding to provide training for its rapidly growing company. It is experiencing dynamic demand for its core products. This rapid growth necessitates the Company to train hundreds of workers in all its proprietary tools, software and approaches. Procore is hiring at a fast pace averaging seven new hires per week for newly-created positions within the company. The proposed training will be provided to trainees at the Company's locations in Carpinteria, San Francisco and San Diego</p> <p>Currently, Procore has a solid competitive edge over other construction project management solutions located out-of-state. To maintain its competitive position, the Company must continually raise the capability and performance level of its employees.</p> <p>This is Procore's second ETP Contract and the second in five years. As a first-time ETP Contractor in its last project, Procore's prior project was for \$99k. The Company earned its initial funds less than a year into the term. Additional funds were added into the prior contract and the Company is on track to earn 100% of the contract amount. This proposal will be a continuation of the training from its last ETP Contract (ET17-0213). No trainee will receive duplicate training.</p> <p>The software industry is competitive and rapidly changing; thus, Procore is expanding its business capacity, adding new employees to existing functions in Administration, Customer Service and Operations. Procore has committed to hiring and training 340 new employees (Job Number 2) to develop new ideas, provide better service to users, and support internal staff.</p>
<i>Training Infrastructure and Administrative Plan</i>	<p>Procore's Peoples Operations Department will oversee all training and internal administration of this project, including training delivery, scheduling, and documentation at the various California locations. This department consists of six staff including a Senior People Operations Manager.</p> <p>In addition, the Company has several in-house subject matter experts to provide training at all locations. The Company has a detailed training schedule and is ready to start training upon Panel approval. Procore has also retained an outside administrative consultant to ensure that all training records meet ETP compliance.</p>
<i>Marketing Plan</i>	Not Applicable

(MEC Only)	
Support Cost Description (MEC Only)	Not Applicable
Substantial Contribution Description	Not Applicable

3. Sample Curriculum

Provided below is a summary of the methods by which training will be delivered including a sample of the courses that will be offered.

Each of the Trainee groups will be able to take courses under the various delivery methods.

Delivery Method	Classroom/Simulated Laboratory
Training Type/Level	Sample Classes
Business Skills	Construction Personas
	Financial Tools
	Quality & Safety Tools
Computer Skills/Standard	Slack
	7Geese
	Cornerstone

Delivery Method	Computer-Based Training
Training Type/Level	Sample Classes
Business Skills	Communication - Presentations
	Innovation - Creative Thinking
	Leadership: Effective Leadership
Computer Skills	Microsoft Excel (Intermediate)
	Microsoft Excel Level 3 (Advanced)
	North Stars (Support Basics)

4. Additional Company or Training Project Details

4.1 Program Waivers

The next table lists the various waivers and supporting justifications for training that apply to this proposed Training Project.

Waivers/Justification Type	Summary
None have been requested	

4.2 Subcontractor Summary

Procore retained the services of the following Subcontractor(s).

Subcontractor Type	Subcontractor Name	City	Service Cost or %
Development	Glendale Community College District	Glendale	No Charge
Administrative	Glendale Community College District	Glendale	10%
Training	None to Date		

4.3 Previous ETP Project Summary

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

Active Contract(s) Elements	Summary
Agreement Number	ET17-0213
Purpose of Training	To train employees in to provide construction professionals with the most comprehensive and easy-to-use project management platform combined with industry leading customer service.
Location(s)	Carpinteria, San Francisco, San Diego
Term	08/17/2016 - 08/16/2018
Approved Amount	\$249,820
Projected earnings	\$249,820
Performance Percentage:	100%
Other Notes	Based on the ETP Systems, 13,426 reimbursable hours have been tracked for potential earnings of \$249,820 (100% of the approved amount). Although there is still over a year remaining in the contract term, the Panel informed Procore to submit a new proposal for additional funding.

4.4 Supporting Panel Proposal Documentation

Provided in Appendixes A, B and C is additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 1 – Group and Job Title Details

The proposed Training Project includes training for the following Trainees, organized by training group.

Group #: 1 – <Retrainees>				
County		ETP Minimum Wage		
<i>San Diego County</i>		<i>\$16.72</i>		
<i>San Francisco County</i>		<i>\$17.63</i>		
<i>Santa Barbara County</i>		<i>\$16.16</i>		

Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post-Retention Wage
<i>San Diego County</i>				
Customer Success I	2	\$18.00 - \$47.00	\$0.00	\$18.00
Customer Success II	2	\$48.00 - \$77.00	\$0.00	\$48.00
Marketing Staff I	3	\$18.00 - \$47.00	\$0.00	\$18.00
Marketing Staff II	2	\$48.00 - \$75.00	\$0.00	\$48.00
Sales Staff I	1	\$20.00 - \$48.00	\$0.00	\$20.00
Sales Staff II	1	\$49.00 - \$69.00	\$0.00	\$49.00
<i>San Francisco County</i>				
Customer Success I	3	\$18.00 - \$47.00	\$0.00	\$18.00
Customer Success II	3	\$48.00 - \$77.00	\$0.00	\$48.00
Marketing Staff I	2	\$18.00 - \$47.00	\$0.00	\$18.00
Marketing Staff II	3	\$48.00 - \$75.00	\$0.00	\$48.00
Sales Staff I	1	\$20.00 - \$48.00	\$0.00	\$20.00
Sales Staff II	2	\$49.00 - \$69.00	\$0.00	\$49.00
<i>Santa Barbara County</i>				
Admin Staff I	16	\$17.00 - \$46.00	\$0.00	\$17.00
Admin Staff II	30	\$46.00 - \$75.00	\$0.00	\$46.00
Business System Analyst II	27	\$50.00 - \$79.00	\$0.00	\$50.00
Business Systems Analyst I	15	\$20.00 - \$49.00	\$0.00	\$20.00

Attachment 1 – Group and Job Title Details

Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post-Retention Wage
Customer Success I	55	\$18.00 - \$47.00	\$0.00	\$18.00
Customer Success II	53	\$48.00 - \$77.00	\$0.00	\$48.00
Engineer I	10	\$30.00 - \$59.00	\$0.00	\$30.00
Engineer II	20	\$60.00 - \$89.00	\$0.00	\$60.00
Finance Staff I	10	\$17.00 - \$46.00	\$0.00	\$17.00
Finance Staff II	20	\$47.00 - \$76.00	\$0.00	\$47.00
Information Technology I	15	\$20.00 - \$49.00	\$0.00	\$20.00
Information Technology II	15	\$50.00 - \$79.00	\$0.00	\$50.00
Manager/Supervisor I	20	\$25.00 - \$54.00	\$0.00	\$25.00
Manager/Supervisor II	30	\$55.00 - \$84.00	\$0.00	\$55.00
Marketing Staff I	21	\$18.00 - \$47.00	\$0.00	\$18.00
Marketing Staff II	20	\$48.00 - \$75.00	\$0.00	\$48.00
Operations I	25	\$18.00 - \$47.00	\$0.00	\$18.00
Operations II	10	\$48.00 - \$77.00	\$0.00	\$48.00
Product Specialist I	60	\$20.00 - \$49.00	\$0.00	\$20.00
Product Specialist II	50	\$50.00 - \$79.00	\$0.00	\$50.00
Sales Staff I	13	\$20.00 - \$40.00	\$0.00	\$20.00
Sales Staff II	17	\$40.00 - \$69.00	\$0.00	\$40.00

Group #: 2 – <Retrainees, Job Creation>	
County	ETP Minimum Wage
<i>San Diego County</i>	<i>\$13.94</i>
<i>San Francisco County</i>	<i>\$14.69</i>
<i>Santa Barbara County</i>	<i>\$13.22</i>

Attachment 1 – Group and Job Title Details

Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post-Retention Wage
San Diego County				
Customer Success I - Job Creation	18	\$18.00 - \$47.00	\$0.00	\$18.00
Customer Success II - Job Creation	15	\$48.00 - \$77.00	\$0.00	\$48.00
Sales Staff I - Job Creation	10	\$18.00 - \$40.00	\$0.00	\$18.00
Sales Staff II - Job Creation	10	\$40.00 - \$69.00	\$0.00	\$40.00
San Francisco County				
Customer Success I - Job Creation	15	\$18.00 - \$47.00	\$0.00	\$18.00
Customer Success II - Job Creation	15	\$48.00 - \$77.00	\$0.00	\$48.00
Sales Staff I - Job Creation	8	\$18.00 - \$40.00	\$0.00	\$18.00
Sales Staff II - Job Creation	15	\$35.00 - \$64.00	\$0.00	\$35.00
Santa Barbara County				
Admin Staff I - Job Creation	4	\$17.00 - \$46.00	\$0.00	\$17.00
Admin Staff II - Job Creation	7	\$46.00 - \$75.00	\$0.00	\$46.00
Customer Success I - Job Creation	25	\$18.00 - \$47.00	\$0.00	\$18.00
Customer Success II - Job Creation	15	\$48.00 - \$77.00	\$0.00	\$48.00
Engineer I - Job Creation	5	\$20.00 - \$49.00	\$0.00	\$20.00
Engineer II - Job Creation	8	\$40.00 - \$69.00	\$0.00	\$40.00
Information Technology I - Job Creation	7	\$20.00 - \$49.00	\$0.00	\$20.00
Information Technology II - Job Creation	10	\$50.00 - \$79.00	\$0.00	\$50.00
Marketing Staff I - Job Creation	15	\$18.00 - \$47.00	\$0.00	\$18.00
Marketing Staff II - Job Creation	15	\$48.00 - \$75.00	\$0.00	\$48.00
Operations I - Job Creation	20	\$18.00 - \$47.00	\$0.00	\$18.00
Operations II - Job Creation	25	\$48.00 - \$77.00	\$0.00	\$48.00

Attachment 1 – Group and Job Title Details

Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post-Retention Wage
Product Specialist I - Job Creation	15	\$20.00 - \$49.00	\$0.00	\$20.00
Product Specialist II - Job Creation	8	\$50.00 - \$79.00	\$0.00	\$50.00
Sales Staff I - Job Creation	30	\$20.00 - \$49.00	\$0.00	\$20.00
Sales Staff II - Job Creation	25	\$50.00 - \$79.00	\$0.00	\$50.00

Attachment 2 - Training Delivery and Curriculum Listing

<i>Delivery Method/Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type/Level	Planned Course Offerings
<i>Business Skills</i>	
	7 Habits of Highly Effective People
	Best Practices in Coaching
	Best Practices in Interviewing
	Building A Rock Solid Team
	Business Communications
	Business Financial Statement
	Business Systems Continuous
	Business Writing
	Change Management
	Collaboration
	Communication Skills
	Compensation and Motivation
	Construction 101
	Construction OS Continuous
	Construction Personas
	Crucial Conversations
	Customer Service
	Customer Success Continuous
	Defusing Emotionally Charged
	Dispute Resolution
	Emotional Intelligence
	Employee/Customer Engagement
	Engineering Continuous Learn
	Finance Continuing Learning
	Financial Tools
	Fish! – Individual and Team Motivation
	Foundations of Construction
	Giving and Receiving Feedback
	Goal Setting
	Handling Difficult Conversation
	Having a Nice Conflict
	High Impact Hiring
	Holding All The ACES
	Interviewing Skills
	Leadership Boot Camp 1
	Leadership Boot Camp 2
	Leadership Development Suite

Attachment 2 - Training Delivery and Curriculum Listing

	Leading Meetings
	Marketing
	Marketing Continuous Learning
	Negotiation Skills
	New Hire Orientation
	New Leader Assimilation for Teams
	People Team Continuous Learning
	Performance Management
	Presenting with Impact and Confidence/Train-the-Trainer
	Product Continuing Learning
	Project Management
	Project Management Tools
	Quality & Safety Tools
	Resilience – The 7 Factors Make a Half-Filled Glass Overflow
	Saas Business
	Sales Continuous Learning
	Situational Leadership II
	Straight Talk
	Strengths Finder – Learning to Leverage Your Top 5 Strengths
	Team Engagement – The 12 Things That Matter
	Time Management
	Time Management
	Transitioning to Leadership
	Understanding Procore
	Understanding Yourself and Others with the MBTI
	Workplace Experience Continuous Learning
Computer Skills	
	7Geese
	Airebrake
	Aireserver
	Bridge
	Bugsnap
	Coding for Non-Technical People
	Concur
	Confluence
	Cornerstone
	EcrionXF
	Fullstory
	Google Suite

Attachment 2 - Training Delivery and Curriculum Listing

	GoToMeeting
	GoToWebinar
	Human Resources Software
	Javascript
	Jira
	Kapost
	Microsoft Excel (Adv.& Int.)
	Mindtouch
	Mobile Devices
	Network Training
	New Relic
	Okta
	Phaseexpress
	ProjectTango
	Ruby on Rails
	Salesforce
	Seismic
	Semaphore
	Sendgrid
	Skilljar
	Skuid
	Slack
	Smanage
	Smart Sheets
	SnagIt
	Softphone
	Software Advice
	Talkdesk
	Tout
	Travisci
	WalkMe
	Workday
	Zendesk
	Zoom

<i>Delivery Method/Level</i>	<i>Electronic Learning/Computer Based Training (CBT)</i>	
Training Type/Level	Planned Course Offerings	Standard Hours
<i>Computer Skills</i>		
	Microsoft Excel (Intermediate)	2

Attachment 2 - Training Delivery and Curriculum Listing

<i>Delivery Method/Level</i>	<i>Electronic Learning/Computer Based Training (CBT)</i>	
Training Type/Level	Planned Course Offerings	Standard Hours
	Microsoft Excel Level 3 (Advanced)	2
	North Stars (Support Basics)	0.5
	QuickBooks for Contractors	1.65
<i>Business Skills</i>		
	Bidding	1.27
	Business Ethics	0.33
	Business Skills - Time Management	0.5
	Communication: Presentations	0.75
	Communication: Effective Feedback	0.5
	Construction 101	4.5
	Construction 102	2
	How BIM has changed Constr.	0.97
	Innovation: Creative Thinking	0.55
	Leadership: Building Trust	0.5
	Leadership: Business Process Improvement	0.58
	Leadership: Change Management	0.5
	Leadership: Developing Team	0.58
	Leadership: Effective Leadership	1
	Leadership: Motivating Remote	0.5
	Leadership: Motivation	0.75
	Leadership: People Management	2
	Leadership: Performance Review	0.5
	Leadership: Teambuilding	0.5
	Leadership: Using the Basics	0.83
	Leadership: Virtual Twist	0.5
	Management: Effective Teams	0.58
	Management: Lose the Meeting Blues	0.58
	Management: Managing Change	0.75
	Management: Succeed Supervisor	0.58
	Management: Team Conflict	0.67
	Management: Virtual Office	0.5
	Product Manager On-Boarding	3
	Project Management Fundamentals	0.75
	Project Management Time/Schedule	0.5
	Project Planning Initiation	0.5
	Project Resource Management	0.75

Attachment 3 - Training Project Characteristics Details

Provided in the table are details on the training characteristics.

Characteristic	Program Summary
Retrainee - Job Creation Retrainee Program	The Panel incentivizes job creation. Training for newly-hired employees is reimbursed at a higher rate, and trainees are subject to a lower post-retention wage. The date of hire for trainees is within the three-month period before contract approval, or within the term of the contract. Trainees are hired into "net new jobs" as a condition of contract. Substantial Contribution and Turnover Rate penalty requirements do not apply.



TRAINING PROPOSAL FOR
Smart & Final Stores, Inc.
17- 0600

Panel Meeting Date: 06/23/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Reeves, Mark
Type of Proposal: Single Employer Contract (SE)
Funding Source: Out-of-State Competition (OSC), Special Employment Training (SET)

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$380,160.00			
Program & Admin Cost	Support Cost	Substantial Contribution (\$ / %)	Total In-Kind
\$380,160.00	N/A	N/A	\$960,000.00

APPLICANT PROFILE

<i>Company Summary</i>	Headquartered in Commerce, Smart & Final Stores, Inc. (Smart & Final) is a warehouse-style retailer that carries groceries and other goods for business and household customers.
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<i>Industry Sector(s)</i>	Transportation and Warehousing, Retail
<i>Priority Industry</i>	Yes
<i>No. of Employees (Applicant)</i>	State: <u>10,995</u> US: <u>12,045</u> World Wide: <u>12,045</u>
<i>Turnover Rate (Applicant)</i>	9.00%
<i>Repeat Contractor</i>	Yes
<i>High Unemployment Area</i>	Yes
<i>Unions</i>	No

TRAINING PROFILE

**Training
Objective**

Smart & Final has identified employee training as one of its primary goals for 2017. Training will bolster the Company's ability to manage and cultivate the talent needed to support recent and future growth.

Training is summarized below. Additional details are provided in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# of Trainees	Reimbursement Rate	Avg. Hours	Cost Per Trainee	Min – Max Hour
1	Retrainees	384	\$18.00	55	\$990	8-200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details on the proposed Training Project.

1. Company Background

Founded in 1871, Smart & Final is a hybrid retailer servicing the needs of businesses and households alike. As of October 2016, the Company operates 304 grocery and foodservice stores under the “Smart & Final,” “Smart & Final Extra!” and “Cash & Carry Smart Foodservice” banners it operates in California, Oregon, Washington, Arizona, Nevada and Idaho.

2. Current Training Project Details

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

<i>Purpose of Training</i>	<p>Smart & Final has been expanding rapidly in recent years, which has increased hiring significantly to accommodate this growth. Since 2012, the Company’s number of new hires has increased by more than 200%. Employee training is vital to the Company’s expansion efforts and its ability to manage growth responsibly.</p> <p>The training outlined in this proposal only targets employees at the Company’s headquarters facility in Commerce and two distribution centers in Commerce and Riverside. Training will focus on process improvements designed to enhance operational productivity and efficiency. It will include supply chain management inventory control, product marketing/promotion, warehousing, data management and leadership.</p> <p>Training will be delivered by in-house experts and vendors to be identified during the contract term. Training will be conducted at Company three locations in Commerce and Riverside.</p>
<i>Training Infrastructure and Administrative Plan</i>	<p>Smart & Final has designated a lead project coordinator, and an internal talent management team to oversee the scheduling, delivery and tracking of training. The Company has also retained an administrative consultant.</p> <p>ETP has approved the use of a Learning Management System for recordkeeping.</p>
<i>Marketing Plan</i> (MEC Only)	N/A
<i>Support Cost Description</i> (MEC Only)	N/A
<i>Substantial Contribution Description</i>	N/A

3. Sample Curriculum

Provided below is a summary of the methods by which training will be delivered including a sample of the courses that will be offered.

Each of the Trainee groups will be able to take courses under the various delivery methods.

Delivery Method	Classroom/Simulated Laboratory
Training Type/Level	Sample Classes
Commercial Skills	Selection (Supply Chain)
	Warehouse (Symphony)
	Receiving (Supply Chain)
Computer Skills	Intactix System Training
	Workiva
	Data Management (Symphony)
Hazardous Materials Skills	Safety/Hazardous Materials
Management Skills	Oz Principle Accountability
	Leadership Development Program
	Financial Management & Budgeting
Delivery Method	Productive Lab (PL)
Training Type/Level	Sample Classes
Productive Lab - Commercial Skills	Loading (Supply Chain)
	Receiving (Supply Chain)
	Forklifts/High Reach Forklifts (Supply Chain)
PL Justification	
Need for Productive Laboratory Training	PL training will provide a real-world learning environment for Distribution Center employees who utilize heavy equipment on a daily basis. According to the Company, PL will allow these workers to achieve the competencies needed to perform their jobs with the highest level of safety and efficiency. Approximately 225 Distribution Center trainees (Loader, Mechanic, Inventory Control, Receiver, Forklift Operator, Clerk, Order Selector) will receive up to 60 hours of productive lab training, in accordance with ETP guidelines. The trainer-to-trainee ratio will be 1:1.
Equipment/Processes to be Used	Walkie pallet jacks, forklifts/high-reach forklifts, equipment maintenance tools, shipping/receiving and inventory control equipment.
Trainer Qualifications	Training will be provided by qualified in-house instructors/supervisors with the knowledge and experience to train and assess requisite distribution operation skills.

4. Additional Company or Training Project Details

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

4.1 Program Waivers

The next table lists the various waivers and supporting justifications for training that apply to this proposed Training Project.

Waivers/Justification Type	Summary
Modified Statewide Average Wage (SET)	The Distribution Center trainees in Group 1 work in an industry sector designated for priority funding by the Panel.
Reduced Standard Wage (HUA)	274 trainees in Group 1 work in the city of Commerce, a High Unemployment Area (HUA) region, with unemployment exceeding the state average by 25%. The HUA wage waiver will only be required for approximately 15-20 trainees.

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost
Development	Ernst & Young LLP	Irvine	\$20,000.00
Administrative	Ernst & Young LLP	Irvine	13%
Training	None Identified		

4.3 Previous ETP Project Summary

None

4.4 Supporting Panel Proposal Documentation

Provided in Attachments 1, 2 and 3 is additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 1 – Group and Job Title Details

The proposed Training Project includes training for the following Trainees, organized by training group.

Group #: 1 – <Retrainees>				
County		ETP Minimum Wage		
Los Angeles County		\$16.96		
Los Angeles County HUA		\$12.72		
Riverside County		\$29.38		
Riverside County (SET WAGE)		\$22.04		
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post-Retention Wage
Los Angeles County – Sheila Dr., Commerce				
Accounting Manager	1	\$30.08 - \$52.94	\$0.00	\$30.08
Accounting Staff/Clerk	6	\$15.68 - \$31.69	\$0.00	\$15.68
Area Manager	8	\$30.08 - \$52.94	\$0.00	\$30.08
Distribution Center Clerk	5	\$14.73 - \$23.57	\$0.00	\$14.73
Forklift Operator	30	\$18.47 - \$28.37	\$0.00	\$18.47
General Manager	1	\$36.39 - \$64.05	\$0.00	\$36.39
Inventory Clerk	11	\$14.73 - \$23.57	\$0.00	\$14.73
Inventory Control Coordinator	3	\$18.97 - \$31.69	\$0.00	\$18.97
Inventory Control Manager/Supervisor	2	\$24.86 - \$52.94	\$0.00	\$24.86
Load Audit Clerk	2	\$15.68 - \$26.19	\$0.00	\$15.68
Loader	14	\$19.00 - \$26.15	\$0.00	\$19.00
Loading Foreman	2	\$16.83 - \$16.83	\$0.00	\$16.83
Mechanic	1	\$20.18 - \$35.51	\$0.00	\$20.18
Office Coordinator	5	\$18.97 - \$31.69	\$0.00	\$18.97
Operations Manager	2	\$30.08 - \$58.23	\$0.00	\$30.08
Order Selector	50	\$18.39 - \$28.30	\$0.00	\$18.39

Attachment 1 – Group and Job Title Details

Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post-Retention Wage
Receiver/Put Away/Repack	25	\$18.00 - \$26.15	\$0.00	\$18.00
Senior AP/Accounting Clerk	8	\$17.25 - \$28.81	\$0.00	\$17.25
Supply Chain Operations Planner	1	\$30.08 - \$52.94	\$0.00	\$30.08
Support	5	\$18.47 - \$28.37	\$0.00	\$18.47
Warehouse Supervisor	2	\$24.86 - \$43.75	\$0.00	\$24.86
Los Angeles County - Citadel Dr, Commerce				
Accounting Manager	2	\$30.08 - \$52.94	\$0.00	\$30.08
Administrator (Junior)	3	\$19.71 - \$40.00	\$0.00	\$19.71
Administrator (Senior)	3	\$50.00 - \$79.00	\$0.00	\$50.00
Analyst	3	\$18.97 - \$48.13	\$0.00	\$18.97
Assistant	4	\$16.83 - \$28.85	\$0.00	\$16.83
Assistant Manager	1	\$19.23 - \$26.44	\$0.00	\$19.23
Associate Manager	2	\$24.04 - \$43.75	\$0.00	\$24.04
Business & Community Representative	1	\$27.34 - \$48.13	\$0.00	\$27.34
Buyer	4	\$24.86 - \$48.13	\$0.00	\$24.86
Coordinator	2	\$17.25 - \$31.69	\$0.00	\$17.25
Department Manager	20	\$24.04 - \$43.75	\$0.00	\$24.04
Director	2	\$38.65 - \$65.00	\$0.00	\$38.65
District Manager	5	\$38.65 - \$65.00	\$0.00	\$38.65
Engineer	2	\$30.08 - \$60.00	\$0.00	\$30.08
Merchandiser	5	\$24.86 - \$43.75	\$0.00	\$24.86
Representative	3	\$17.25 - \$40.00	\$0.00	\$17.25
Senior Analyst	2	\$24.86 - \$48.08	\$0.00	\$24.86

Attachment 1 – Group and Job Title Details

Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post-Retention Wage
Senior Manager	1	\$24.04 - \$53.00	\$0.00	\$24.04
Specialist	5	\$18.97 - \$48.08	\$0.00	\$18.97
Supervisor	6	\$24.86 - \$52.94	\$0.00	\$24.86
Trainer	14	\$20.18 - \$35.51	\$0.00	\$20.18
<i>Riverside County</i>				
Area Manager	9	\$30.08 - \$52.94	\$0.00	\$30.08
Coordinator	5	\$18.97 - \$31.69	\$3.07	\$22.04
Distribution Center Clerk	6	\$18.54 - \$23.57	\$3.50	\$22.04
Forklift Operator	15	\$18.54 - \$28.37	\$3.50	\$22.04
General Manager	1	\$36.39 - \$64.05	\$0.00	\$36.39
Inventory Control	5	\$18.54 - \$23.57	\$3.50	\$22.04
Loader	10	\$19.00 - \$26.15	\$3.04	\$22.04
Order Selector	43	\$18.54 - \$28.30	\$3.50	\$22.04
Quality Control	3	\$18.54 - \$28.86	\$3.50	\$22.04
Receiver	9	\$18.54 - \$26.15	\$3.50	\$22.04
Warehouse Foreperson	3	\$19.00 - \$29.37	\$3.04	\$22.04
Warehouse Operations Manager	1	\$33.09 - \$58.23	\$0.00	\$33.09

Attachment 2 – Training Delivery and Curriculum Listing

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

<i>Delivery Method/Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type/Level	Planned Course Offerings
<i>Computer Skills</i>	
	Arthur System Training
	Data Management (Symphony)
	Excel Training (Advanced/Intermediate)
	Intactix System Training
	JDA IT Training
	Lawson/Infor
	Lease Tool
	SAP Training
	Symphony Gold IT Training
	Tm1 Upgrade Training
	Transportation Management System Training
	Workiva
<i>Commercial Skills</i>	
	Demand Certification (JDA)
	Floor Planner Certification (JDA)
	Food Safety Management (Riv DC)
	Forklifts (Supply Chain)
	Loading (Supply Chain)
	Receiving (Supply Chain)
	Selection (Supply Chain)
	Warehouse (Symphony)
<i>Hazardous Materials Skills</i>	
	Safety/Hazardous Materials
<i>Management Skills</i>	
	Business Communication (RMCP)
	Business Computer Applications (Technology) (RMCP)
	Financial Management & Budgeting (RMCP)
	Human relations (RMCP)
	Human Resource Management (RMCP)
	Leadership Development Program
	Marketing (RMCP)
	Oz Principle Accountability Training
	Promotions (Rsi - DM/RVP)
	Promotions Management and Optimization (JDA)
	Retail Management (RMCP)

Attachment 2 – Training Delivery and Curriculum Listing

<i>Delivery Method/Level</i>	<i>Productive Lab (PL)</i>
Training Type/Level	Planned Course Offerings
<i>Commercial Skills</i>	Ratio 1:1
	Forklifts/High Reach Forklifts (Supply Chain)
	Loading (Supply Chain)
	Receiving (Supply Chain)
	Selection (Supply Chain)
	Transportation Training (Supply Chain)
<i>PL Justification and Details</i>	
Explain the need for productive laboratory (PL) training.	Supply Chain training, including Selection and Forklifts training, include classroom, simulated lab and productive lab training. The distribution center employees who will be using heavy equipment must have this comprehensive training program in order to ensure that they are able to safely operate it. A fully-supervised productive lab environment allows the trainees to complete the final level of training in a live environment, where their abilities can be assessed in a real-world setting.
Describe the Equipment/Processes to be used in delivering PL training	As the final level of training, trainees operate a two-pallet walkie jack (Selection training) or a forklift/high-reach forklift (Forklift training) while being supervised by a qualified employee who ensures that the trainee is qualified for his or her position.
Describe Trainer Qualifications:	Trainers are seasoned employees/supervisors who have adequate experience to train and assess the trainees. Trainers are qualified on the specific equipment on which they are instructing and are up to date on all required training (including safety training).

Attachment 3 - Training Project Characteristics Details

Provided in the table are details on the training characteristics.

Characteristic	Program Summary
High Unemployment Area (HUA).	Some trainees work in a High Unemployment Area (HUA), with unemployment exceeding the state average by 15%. For these trainees the post retention wage may be modified by up to 25% below the New Hire ETP minimum wage.



RETRAINEE - JOB CREATION

Training Proposal for:

Goforth & Marti dba GM Business Interiors

Agreement Number: ET18-0100

Panel Meeting of: June 23, 2017

ETP Regional Office: San Diego

Analyst: M. Ray

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative	Industry Sector(s):	Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Riverside and San Diego	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 250	U.S.: 250	Worldwide: 250
<u>Turnover Rate:</u>	14%		
<u>Managers/Supervisors:</u> (% of total trainees)	7%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$324,000		\$0	\$0		\$324,000

In-Kind Contribution:	100% of Total ETP Funding Required	\$379,984
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Mfg. Skills, PL - Computer Skills, PL - Mfg. Skills	140	8 - 200	0	\$1,800	\$16.16
				Weighted Avg: 100			
2	Retrainee Priority Rate Job Creation Initiative	Business Skills, Computer Skills, Mfg. Skills, PL - Computer Skills PI – Mfg. Skills	30	8 – 200	0	\$2,400	*\$14.00
				Weighted Avg: 120			

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

Minimum Wage by County: Job Number 1: \$16.16 per hour for Riverside County and \$16.72 per hour for San Diego County; and Job Number 2 (Job Creation): \$13.22 per hour for Riverside County and \$13.94 per hour for San Diego County.

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

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

Up to \$1.94 per hour may be used to meet the Post-Retention Wage for Job Number 1 only.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Client Services	\$16.00 - \$43.75	9
Designer	\$16.00 - \$36.06	16
Driver	\$17.00 - \$19.00	2
Facility Maintenance	\$24.64	1
Installer	\$14.22 - \$28.00 (Riverside) \$14.78 - \$28.00 (San Diego)	59
Move/Add/Change Staff	\$14.22 - \$43.75 (Riverside) \$14.78 - \$43.75 (San Diego)	4
Operations	\$24.04 - \$32.69	2
Project Management	\$29.33 - \$39.90	8
Service Technician	\$14.22 - \$19.75 (Riverside) \$14.78 - \$19.75 (San Diego)	3
Warehouse Assistant	\$14.22 - \$22.00 (Riverside)	13

	\$14.78 - \$22.00 (San Diego)	
Supervisor	\$21.00 - \$30.88	11
Manager I	\$20.00 - \$40.00	8
Manager II	\$40.01 - \$62.59	4
Job Number 2		
Designer	\$14.00 - \$16.00	5
Installer	\$14.00 - \$17.00	18
Service Technician	\$14.00 - \$16.00	3
Warehouse Assistant	\$14.00 - \$16.00	4

INTRODUCTION

Founded in 1944, Goforth & Marti dba GM Business Interiors (GMBI) (www.gmbi.net) designs, manufactures, and installs indoor and outdoor workplace furniture and systems. The Company provides professional assembly and installation of prefabricated furniture and systems, as well as design, manufacture, and installation of custom furniture. GMBI also offers flooring, restoration, refurbishment, asset management, as well as moves, adds, and changes work orders to various industries including corporate, healthcare, government, educational facilities, and libraries.

Headquartered in Riverside, the Company has a co-located distribution center (Riverside), warehouse (San Diego), and showroom (San Diego). All three facilities will participate in training.

PROJECT DETAILS

Company representatives report that in the last two years, GMBI experienced a significant increase in the demand for its design and installation services. As a result, the Company increased its staffing by 35%, from 185 in 2015 to the current 250 employees. During this period, GMBI was also awarded new contracts from the Veterans Administration, Space and Naval Warfare Systems Command, Illumina, Semptra Energy, and SDG&E. Furthermore, in the next two years, the Company projects to expand its business with its current customers in the government, educational facilities, and healthcare industries as well as add flooring installation services including tile, carpet, and laminate as an in-house service.

In order to successfully support growth and anticipate increased business needs, GMBI has committed to provide its workers comprehensive training that will focus on improving trainee knowledge and skills in codes, building standards, regulations, clearances, and customer requirements, specifically in comprehensive design and installation services. Training will also focus on current design trends, new technology, and construction standards to meet customer diverse demands.

GMBI has experienced a shift in the design of workspaces, from traditional office furniture and closed workspaces to more open concepts and shared, multi-purpose workspaces. GMBI must provide training to its workers in the design, manufacture, and install of products from pre-fabricated systems requiring assembly, to custom-made pieces.

ETP-funded training will enable GMBI to provide workers the skills to effectively install, reconfigure, move, and refurbish complex systems. The Company will also provide in-depth training on various systems that require electrical, mechanical, construction, and manufacturing

skills necessary to improve product lines. The Company will provide comprehensive training and cross-training to its workers to effectively streamline workflow and improve manufacturing processes to successfully support business growth, customer demands, and most importantly, remain competitive in the industry.

Training Plan

GMBI assessed its training needs based on the Company's current training plan model. Workers receive at least 135 hours of training in a 21-month period (manufacturing staff receive 40-50 hours classroom training and 20-40 hours Productive Laboratory (PL) training annually.

GMBI's annual training model includes succession planning intended to promote workers through classified levels: This multi-level training model ensures workers are proficient in all job skills. The skills become more complex at each level. As the complexity increases, so does the amount of time needed to complete each level. In 2016, the Company provided an average of 70 hours of training for Designers and 85 hours for Installers. Workers are on track to exceed the number of training hours from 2016.

GMBI created a space for trainees to receive training in a classroom/laboratory environment, training previously delivered in the field. GMBI also created a simulated field environment where trainees can build, install, and rebuild systems. This new training space will facilitate structured classroom/laboratory training.

GMBI will deliver at least 135 training hours for its incumbent trainees and 168 hours for its Job Creation trainees. Training will focus on product knowledge, customer service, and manufacturing skills. Approximately 170 incumbents and newly-hired trainees will receive training delivered by in-house trainers via class/lab and PL in the following:

Business Skills (35%) – Training will be offered to all job occupations. Course topics include: Business Administration, Business and Report Writing, Product Knowledge, Project Management, Communication, and Customer Service skills. Training will provide staff with skills to effectively interact with customers and better assess customer expectations which will be essential in building and strengthening customer relationships.

Computer Skills (15%) – Training will be offered to Client Services, Designer, Installer, Move/Add/Change Staff, Operations, Project Management, Service Technician, Warehouse Assistant, Supervisor, and Manager. Training in Office 365 (Intermediate and Advanced), Z-Axis, Revit, AutoCAD, SketchUp, Bluebeam, Elevate, and CRM software applications skills will provide trainees the technical knowledge necessary to meet customer requirements.

Manufacturing Skills (50%) – Training will be offered to all occupations as it pertains to their job functions. Course topics include Tools and Equipment Operation, Warehouse Skills, Inventory Management, Design Process, Lean Process, and various Codes/Clearances. Training will allow workers to keep pace with various industry standards and regulations and incorporate them with the Company's design and manufacturing processes.

Productive Laboratory – Computer and Manufacturing Skills

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

GMBI requests PL training for all trainees in Computer and Manufacturing Skills. PL training is critical in all phases of product design, installation, and manufacturing processes. During the

initial phase of the manufacturing process, the Design team must work with customers to create customized functional and aesthetically pleasing systems. PL training in various software systems used by the Design team is vital to product development and the commencement of the manufacturing process.

PL training in Manufacturing Skills will include extensive topics in Loading and Transporting Product, Field Training, Customer Service, Wood Furniture Handling/Techniques, Product Development, Design Standards/Processed, and Product Knowledge. Manufacturing Skills training will be in a wide range of tools and equipment used by Warehouse Assistants, Installers, Supervisors, Managers, and Drivers. These tools are primarily used in the warehouse/distribution center to load/unload, inspect, store, and transport furniture to customers where the field employees assemble the systems.

Training will allow field Installers to identify and use the appropriate tools to assemble each type of system and their electrical components, overheads, work surfaces, and types of screws and bolts. Workers use the same tools when a repair is required or when an addition or move is made.

Designers will receive up to 60 hours PL. Installers will receive up to 40 hours for the Client Services Staff, Drivers, Facility Maintenance Staff, Move/Add/Change Staff, Operations, Project Management, Service Technicians, Warehouse Assistants, Supervisors, and Managers. As such, GMBI requests funding of up to 60 hours of PL training.

The Company requests a trainer-to-trainee ratio of up to 1:3. GMBI normally trains in small groups because it is impractical for the Company to train only one employee on a skill specific to one system that the Company may not have the same system (training opportunity) for another six months. Training will allow trainees to acquire the skills to become proficient in design and manufacturing processes without the pressure of normal production requirements.

PL trainers will be qualified, skilled, and/or subject-matter experts to instruct and deliver the course content and material. The trainer will be responsible for educating, demonstrating, and instructing procedures, as well as answering questions and documenting training. Trainer will be with the trainee the entire PL training to provide direction, instructions, feedback, as well as determine trainee's skill proficiency to move up to the next level. Trainers will also document training daily.

Retrainee - Job Creation

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

To support business growth and expansion of its products and services, GMBI has committed to hire approximately 30 new employees: 5 Designers, 18 Installers, 3 Service Technicians, and 4 Warehouse Assistants (Job Number 2). The date-of-hire for all trainees will be within the three-month period before contract approval or within the term-of-contract. Trainees will be hired into "net new jobs" as a condition of contract.

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. Current company-funded training includes a full range of warehouse skills, product knowledge, product care (loading/unloading and handling/unpacking) delivered via classroom, laboratory (simulated), and on-the-job.

➤ **Training Infrastructure**

GMBI will contract with a vendor to assist with ETP project administration. The Company has designated its Human Resources (HR) Manager to coordinate ETP training at all locations and oversee the project. Further, Installation and Department Managers at each location will be responsible for scheduling and conducting training. Two HR Staff at each facility will provide additional administrative support including tracking training as well as collect and submit training rosters to the administrative subcontractor for data entry into ETP Systems.

Other Resources

In 2016, GMBI was awarded \$41,402 through the California Enterprise Zone. These monies will not be used for training outlined in this proposal.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

GMBI retained Welsh Advisors, Inc. (Welsh Advisors) in Anaheim to assist with development of this proposal for a flat fee of \$26,406.

ADMINISTRATIVE SERVICES

Welsh Advisors will also perform administrative services in connection with this proposal for a fee not to exceed 6% of payment earned.

TRAINING VENDORS

N/A

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

8 - 200 Trainees may receive any of the following:

BUSINESS SKILLS

- Business Administration
- Business and Report Writing
- Product Knowledge
 - Product Lines/Product names
 - Primary Function
 - English – Spanish Name Translation
 - Competitor's product lines
 - How they compare to GM's products
- Floor Plans
 - Symbols, Nomenclature, and Legends
- Project Management
- Communication Skills
- Customer Service Skills - Showroom
- Consultative Selling Skills
- Data Transfer Procedures
- Research/Resources
 - I-drive
 - Kiosk
 - Planning Guides
 - Price Books
 - Library
- Leadership Skills
- Organization Skills
- Presentation Skills

COMPUTER SKILLS

- Office 365
 - Excel (Intermediate to Advanced Skills)
 - Outlook (Intermediate to Advanced Skills)
- Z-Axis
- Revit
- AutoCAD
- SketchUp
- Bluebeam
- CAP
- e-Portfolio
- Elevate (Proprietary Software)
 - Design Work Order Process
- CRM Software

MANUFACTURING SKILLS

- Manufacturing Skills
 - Product Development
 - Assembly Techniques

- Customer Service - Field
- Tools and Equipment
 - Identification/Function
 - Operation
- Field Training
 - Systems
 - Identification/Functions
 - Components
 - Installation Fundamentals
- Warehouse Skills
 - Uncrating, Inspection, and Load Staging
 - Warehouse Inventory/Organization
 - Warehouse Regulations and Policies
 - Warehouse Assembly of K+D + RTA + Systems Prep
 - Equipment Operation
 - Hand trucks, Four Wheel Dollies, Gondolas, and Panel Carts
- Inventory Management
- Design Process
 - Planning
 - Open Office
 - 120 Degree
 - 135 Degree
 - 90/120 Degree
 - Rectilinear
 - Benching
 - Private Office
 - Traditional
 - Contemporary
 - Modern
 - Shared
 - Group Workspace Collaborative
 - Conference Room
 - Training Room
 - Meeting Room
 - Open Collaborative Space
 - Living Office Setting
 - Peripheral
 - Break Room
 - Wellness
 - Game Room
 - File Storage
 - Lobby
 - Multiple Seating
 - Modular Lounge
 - Healthcare
 - Government
 - Planning (Healthcare)
 - Caregiver Work Environments
 - Patient Room (Caregiver Efficiency)
 - Nurse Stations

- Collaboration and Heads Down
- Flexibility Adaptability
- Places to Rest and Refresh
- Patient Care
 - Adaptable and Functional
 - Infection Control
 - Patient and Family Friendliness
 - Patient Focused Units
- Ambulatory Care
 - Clinical, Admin, & Public Spaces
 - Adaptive Environments
 - Admin and Physician Workspace Design
 - Way-finding and Signage
- Surgical Services
 - Effective Design
 - Improve Work Processes
 - Control Stations
- Pharmacy
 - Address Specific Processes
 - Manage Technology and Equipment
- Laboratory
 - Adaptive Design
 - Productive and efficient patterns of travel
 - Ergonomic Principle-lighting, reach, bend, placement of equipment
 - Address Processes
- GM Drawing Standards
- Lean Process
 - Toyota Production System (TPS)
 - Principles of LEAN
 - Patterns of Care
 - Influencing Facility Design
- Codes/Clearances
 - ADA
 - Title 24
 - DSA
 - LEED
 - CBC

Productive Lab Hours (Ratio 1:3)

0 – 60

COMPUTER SKILLS

- Z-Axis
 - Project Set up
 - Apply Finishes
 - Render
 - Tile Plan
 - Electrical Plan
 - Create Custom Product

- CAP
 - Import, Export, SIF
 - Input Custom Product
 - Apply Contracts/Discounts
 - Create Report
 - Tagging
- AutoCAD
 - Drawing Set up
 - Create Custom Object/Block
 - Interface with Z-axis and CAP
 - Standard Drawing Skills
- Revit
 - Drawing Set up
 - Create Custom Object/Block
 - Interface with Z-axis and CAP
 - Standard Drawing Skills
 - BIM Standards
 - Application of software to Healthcare products
- e-Portfolio
 - Typicals
 - Menu Budget
 - Research
 - Product Master

MANUFACTURING SKILLS

- Loading and Transporting Product
 - Safety Procedures
 - Loading/Unloading
 - Based on Type of Truck
 - G/M Loading Dock Procedures
- Field Training
 - Systems
 - Installation
 - Staging/Task Lights
 - File Interiors/Basics
 - Panels, Electrical, Overheads, & Work Surfaces
 - Wall Mounted Overheads
 - Systems Overheads & Work Surface Components
 - Electrical Components
 - Adjustments
 - Height/Weight, Comfort, Preferences
 - Pedestal & Lateral Files in Workstations
 - Place & Level
 - Clean & Set Interior
 - Verify Working Drawers/Locks
 - Conference Tables
 - Measuring
 - Staging
 - Placing
 - Connect & Level
 - Meridian/Tu Filing

- Level & Match
 - Alignment
 - Connections
 - Full Installation
- Desking Models
 - Measuring
 - Staging
 - Placing
 - Connect & Level
 - Components
 - Drawers
 - Keyboard Trays & Monitor Arms
 - Locks
- RTA + KD + Small Systems
 - Assemble & Install Lights
 - Assemble & Install Tables
 - Assemble & Install RTA seating
- Non-Anchored Break-Room & Patio Furniture
 - Tools – Screws or Bolts
 - Damage Free Unloading
 - Full Installation
- Moving/Recon Systems Projects
 - Proper Staging
 - Prevent Damage
 - Setup and Connect
 - Level, Setup Drawers
 - Lock cores
- Storage Cases & Towers and Bookcases
 - Assist with Seismic
 - Level, Setup, and Clean up
- Customer Service
 - Customer Interaction/Communication
 - POD
 - Function
 - Customer Signature Required
 - Punchlist
 - Punchlist Photo
- Cleaning Process
 - Glass
 - Furniture Cleaning Techniques
 - Wood & Non-wood
 - Approved Cleaning Fluids
- Wood Furniture Handling/Techniques
 - Tools & Equipment
 - Function & Operation
 - Wood Furniture Protocols
 - Packing/Unpacking
- Product Development
 - Bidding/Planning
 - Provide solutions during bid committee meetings
 - Suggest products for bids and competitive situations
 - Ability to value engineer

- Reconfiguring
 - Effective use of existing product
 - Apply design solution
 - Prepare required recon drawing
- Fabrics/Finishes
 - Applicable system finishes
 - Upcharges
 - Metallic
 - Flat
 - Testing Processes
 - COM
 - COL
 - HM
 - Tap Program
- Collaborative Spaces
 - Living office
 - Work Modes
 - Settings
 - Product Lines
- Private Office Specifications
 - Clearances
 - Cap to find symbols
 - MFG Support
- Design Standards and Processes
 - Drawing Practices
 - Format Exhibits
 - Title Block
 - 2D/3D/Z-Renders
 - Annotations
 - Notes
 - Install Information
 - Electrical
 - Tile Plans
 - Drawing Format/Set up and Management
 - XREFs
 - Name Saving File Maintenance
 - Master Files
 - GM Drawing Standards
 - HC Exhibits
 - Appropriate Finishes
 - 2D/3D
 - Elevations
 - Material Management
 - Improve Processes
 - Reduce Waste
 - Inventory
 - Organization
 - Flexibility
 - Design Boards
 - Graphic Design Layout
 - Organization
 - Execution Skills

- Technology/Ergonomic Integration
 - Planning for Tech
 - Compatibility
 - GM Progression of Ergonomics
 - Web-Based Planning Program
 - Present Survey Concept
 - Modify Existing Survey
 - Create New Survey
 - Retrieve Survey Results
 - Evidence-Based Design (from survey data)
- Field Training
 - Warehouse Skills
 - Assist with HMI Truck Receiving
 - Assist with Installation
 - G/M Loading Dock Procedures
 - Label and document existing inventory
 - Inventory Data Sheet
 - Pre-Installation/Installation Skills
 - Field Verification
 - Field Planning Worksheet
 - Field Measure Check Plans
 - Check dimensions against electronic file
 - Update building shell to reflect changes
 - Core Locations
 - Provide Dimensions
 - Field Inventory
 - Inventory Data Sheet
 - Herman Miller System Inventory
 - Customer Service Skills
 - Communication Skills
 - Provide effective design solutions
 - Impromptu design using AutoCAD and Z-Axis
 - Effective Notetaking
 - Application of knowledge to guide client's selections
- Product Knowledge
 - Systems
 - Canvas
 - Ethospace
 - Resolve
 - Passage
 - My Studio
 - Components
 - Capabilities
 - Best Planning Applications
 - Electrical
 - Materials and Finishes
 - Furniture Compatibility
 - Filing/Storage
 - Meridian
 - Canvas Storage
 - Tu
 - Teneo

- High Density
- Shared/Common
- Desking/Tables
 - Canvas Desking
 - Gunlocke
 - First Office
 - Pulse
 - Impulse
 - Vegas
 - Krug
 - Hon Voi
 - National
 - Intersect, Avive, Everywhere, ISE
- Systems (Healthcare)
 - OSHPD
 - Anchor
 - Wall Backing
 - Weights-Heights
 - Drawings
 - OPA's
 - Submittal Package
 - Compass
 - Construc
 - Casework
 - Etho Nurse Station
 - Action Office
 - HC Carts
 - Components
 - Capabilities
 - Best Planning Applications
 - Electrical
 - Materials and Finishes

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. PL is capped at 60 hours, per-trainee.



**TRAINING PROPOSAL FOR
BioMarin Pharmaceutical Inc.
Critical Proposal
17- 0645**

Panel Meeting Date: 06/23/2017
Regional Office: San Francisco Regional Office
Analyst Name: Hoover, Chris
Type of Proposal: Single Employer Contract (SE)
Funding Source: Out-of-State Competition (OSC)

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$823,969.00			
Program & Admin Cost	Support Cost	Substantial Contribution (\$ / %)	Total In-Kind
\$899,380.00	N/A	\$75,411 / 15%	\$1,857,262.00

APPLICANT PROFILE

Company Summary	BioMarin Pharmaceutical Inc. (BioMarin) develops and manufactures pharmaceuticals for rare but serious autoimmune and inherited metabolic diseases. The Company's line of medications is targeted for populations of 200,000 patients or fewer. The Company has been designated as a Critical Proposal project because it is expanding in California.
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Industry Sector(s)	Medicinal and Botanical Manufacturing
Priority Industry	Yes
No. of Employees (Applicant)	State: <u>1,654</u> US: <u>2,150</u> World Wide: <u>2,263</u>
Turnover Rate (Applicant)	9.00%.
Repeat Contractor	Yes
High Unemployment Area	No
Unions	No

TRAINING PROFILE

<i>Training Objective</i>	Provide training on new manufacturing processes at BioMarin's plant in Novato. Provide training for continued growth and product expansion at the Company's R&D location in San Rafael.
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Training is summarized below. Additional details are provided in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# of Trainees	Reimbursement Rate	Avg. Hours	Cost Per Trainee	Min – Max Hour
1	Retrainees	798	\$18.00 (\$26 AT)	35	\$630	8-200
2	Retrainees, Job Creation	296	\$20.00 (\$26 AT)	67	\$1,340	8-200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details on the proposed Training Project.

1. Company Background

Founded in 1997, BioMarin (www.biomarin.com) is headquartered in San Rafael and has a manufacturing facility in Novato. BioMarin develops and markets biopharmaceuticals for serious diseases and medical conditions. The Company selects product candidates based on factors: significant unmet medical need, well-understood biology, and opportunity to be first-to-market. Its product portfolio consists of five approved products and multiple clinical/pre-clinical candidates. BioMarin's customers include a limited number of specialty pharmacies and end-users, such as hospitals and government agencies.

2. Current Training Project Details

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

<i>Purpose of Training</i>	<p>This is BioMarin's third ETP project. The Governor's Office of Business and Economic Development (GoBiz) has designated this project as a Critical Proposal. This designation is a result of BioMarin's expansion over the past five years as well as its plans for continued growth over the next few years.</p> <p>BioMarin is requesting ETP funds for training to stay current with federal/state regulations and remain competitive in the market place. This reflects the fact that biopharmaceutical manufacturing is a complex process. Strict regulatory requirements are imposed by the FDA and other foreign regulatory agencies where the Company's products are sold.</p> <p>The training plan will expand and upgrade trainee skills in an advanced manufacturing setting (clean room). Additionally, training has been customized to drive Continuous Improvement throughout the Company. Training courses will focus mainly on Good Manufacturing Practices goals. Training will also be offered in the areas of Clinical Trials, Process Development, Program Management, R&D, Production, Quality Control, and Maintenance.</p> <p>BioMarin is expanding its workforce to support the Company's growth. The Company plans to hire 310 employees during the Agreement.</p>
<i>Training Infrastructure and Administrative Plan</i>	<p>ETP funds will not displace BioMarin's existing financial commitment to training. The Company's current training budget in California is \$8,200,000. BioMarin has a Training Manager, two Administrative Coordinators and support staff located at the San Rafael facility; and one Training Administrator with support staff at the Novato facility, who are directly responsible for scheduling, tracking and reporting. The Company uses an enterprise-wide learning management system (LMS). The LMS (ComplianceWire) is used to document all BioMarin sponsored training company-wide, and it has been in use for over 10 years. BioMarin has also retained an administrative consultant with experience in the biopharmaceutical.</p>
<i>Substantial Contribution Description</i>	<p>BioMarin requests to decrease the 15% Substantial Contribution (SC) for trainees in Group 1 (SC does not apply to Group 2 trainees under Job Creation). The Company's previous Agreement was assessed a 15% rate and, as such, it could be assessed a 30% SC. However, for Critical Proposals, the Panel may modify the rate.</p>

3. Sample Curriculum

Provided below is a summary of the methods by which training will be delivered including a sample of the courses that will be offered.

Each of the Trainee groups will be able to take courses under the various delivery methods.

Delivery Method	Classroom/Simulated Laboratory
Training Type/Level	Sample Classes
Continuous Improvement Skills	Quality Measurement in Biosciences
	Good Clinical Practice
	Cell Growth and Productivity
	Product Quality and Reliability
Computer Skills / Standard	Enterprise Resources Planning (ERP) Systems
	Manufacturing Controls Systems
	Project Management Software
	Microsoft Tools (Intermediate / Advanced)
Manufacturing Skills / Standard	Production Equipment Change Control Procedures
	Clean Room Protocol
	Lean Manufacturing Techniques
	Warehousing and Inventory
	Equipment Technical Qualifications and Certifications
Manufacturing Skills / Advanced Technology (AT)	Cell Culture and Purification Products
	Bioreactor Setup and Production
Manufacturing Skills / Productive Lab (PL)	Good Manufacturing Practices (GMP)
	Equipment Qualification and Validation
Computer-Based Training (CBT)	Problem Solving (1.5 hours)
	SAP Integration Process (1 hour)
	Leadership/Coaching (3.5 hours)

4. Additional Company or Training Project Details – Keep all subparagraphs

AT (Manufacturing Skills) and PL (Manufacturing Skills) courses will be included.

4.1 Program Waivers

The next table lists the various waivers and supporting justifications for training that apply to this proposed Training Project.

Waivers/Justification Type	Summary
PL Total Hours Cap Waiver	BioMarin requests up to 132 PL hours per-trainee for newly hired Production Workers, as a modification from the 60-hour cap. These trainees require higher hours to learn how to use and maintain advanced equipment. These trainees will require over 200 hours of PL training, with the amount in excess of 132 paid for by BioMarin. Some trainees in other occupations will also receive PL, at up to 60 hours. All PL

	training will be conducted in the clean room (production environment).
Substantial Contribution (SC) Rate Waiver	BioMarin requests a 15% SC as stated above.

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost
Development	Herrera & Company	Stockton	\$8,750.00
Administrative	Herrera & Company	Stockton	13% of earned funds
Training	None to Date		

4.3 Previous ETP Project Summary - In this section the tables can be deleted if not needed

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

Active Contract(s) Elements	Summary
Agreement Number	ET16-0152
Purpose of Training	The Company's second ETP project focused on meeting its future commercial and clinical product needs by expanding manufacturing operations at the Novato plant. Infrastructure improvements included adding a cell culture and fermentation capacity, to support seven clinical and commercial products. BioMarin also built a three-story, 85,000-square-foot research and development (R&D) facility at its headquarters in San Rafael, during the time period of the prior Contract. The current proposal builds upon this growth. Any incumbent workers trained under the prior Contract will receive different training courses for new technology, processes and equipment.
Location(s)	San Rafael and Novato
Term	09/08/2015 – 09/07/2017
Approved Amount	\$843,300
Projected Earnings	Based on ETP Systems as of May 16, 2017, 39,252 reimbursable hours have been tracked for potential earnings of \$720,948 (85% of Approved Amount). The Contractor projects final earnings of 95-100% based on training currently committed to and in progress through June 2017.
Performance Percentage	86%
Other Notes	N/A

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

Past Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance %
ET13-0209	Novato and San Rafael	11/26/12 – 11/25/14	\$457,920	\$452,822	99%

4.4 Supporting Panel Proposal Documentation

Provided in Attachments 1, 2 and 3 is additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 1 – Group and Job Title Details

The proposed Training Project includes training for the following Trainees, organized by training group.

Group #: 1 – Retrainees				
County		ETP Minimum Wage		
Marin		\$17.63		
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post Retention Wage
Administrator	44	\$17.63 - \$37.63	\$0.00	\$17.63
Engineer	240	\$25.00 - \$45.00	\$0.00	\$25.00
Production Worker	434	\$20.00 - \$40.00	\$0.00	\$20.00
Scientist	52	\$30.00 - \$50.00	\$0.00	\$30.00
Manager	28	\$30.00 - \$50.00	\$0.00	\$30.00

Group #: 2 – Retrainees, Job Creation				
County		ETP Minimum Wage		
Marin		\$14.69		
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post Retention Wage
Engineer	120	\$20.00 - \$40.00	\$0.00	\$20.00
Production Worker	156	\$18.00 - \$38.00	\$0.00	\$18.00
Scientist	20	\$30.00 - \$50.00	\$0.00	\$30.00

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method</i>	<i>Classroom/Simulated Laboratory</i>
Training Type/Level	Planned Course Offerings
<i>Continuous Improvement</i>	
	Advanced Good Laboratory Practices
	Cell Growth and Productivity
	Developing and Maintaining Laboratory Quality
	Effective Teams
	Good Clinical Practice
	Good Manufacturing Practices (GMP)
	GxP Compliance Training
	Isolation and Characterization of Stable Cell Line
	Leadership and Coaching Skills
	Presentation Skills
	Processes for Production of Gene Therapy Vectors
	Product Quality and Reliability
	Protocols for Preclinical Studies and Data
	Quality Fundamentals / Core Skills
	Quality Measurement in Biosciences
<i>Computer Skills / Standard</i>	
	eBusiness Applications
	Enterprise Resources Planning Systems
	Financial / Accounting Systems
	Human Capital Management Systems
	Manufacturing Control Systems
	Microsoft Tools (Intermediate and Advanced)
	Network Security
	Project Management Software
<i>Manufacturing Skills / Standard</i>	
	Calibrating and Maintenance
	Clean Room Protocol
	Equipment and Instrument Qualifying
	Equipment Cross Training
	Equipment Technical Qualifications and Certifications
	Lean Manufacturing Techniques
	Production Equipment Change Control Procedures
	Set-Up Inspection and Use of Production Equipment
	Warehousing and Inventory

Attachment 2 - Training Delivery and Curriculum Listing

<i>Delivery Method</i>	<i>Classroom/Simulated Laboratory</i>
Training Type/Level	Planned Course Offerings
<i>Computer-Based Training (CBT)</i>	
	Advanced Desktop Applications (2 hours)
	Finance / Accounting Reporting (3.5 hours)
	Leadership / Coaching (3.5 hours)
	Problem Solving (1.5 hours)
	Quality Fundamentals / Core Skills (2 hours)
	SAP Integration Process (1 hour)

<i>Delivery Method</i>	<i>Productive Lab (PL)</i>
Training Type/Level	Planned Course Offerings
<i>Manufacturing Skills / Productive Lab</i>	
	Equipment Qualification and Validation
	Good Manufacturing Practices
	Machine Set-Up, Calibration and Maintenance
	Manufacturing Process Cross Training
	Production and Equipment Operations
<i>PL Justification</i>	
Need for Productive Laboratory Training	BioMarin is proposing to deliver Productive Lab (PL) training to its front-line Production Workers, Engineers and Scientists to ensure that they acquire the critical manufacturing skills needed to perform their jobs at a quality standard acceptable by the FDA. In this proposal, 700 incumbent workers (Group #: 1 - Retraitees) and 332 newly hired workers (Group #: 2 - Retraitees, Job Creation) will receive PL training. The PL training will be delivered in a clean room environment. Newly hired Production Workers will receive up to 132 hours of PL. Other trainees will not exceed 60 hours. The trainer-to-trainee ratio will not exceed 1:1.
Equipment/Processes to be Used	The PL equipment/technology includes the following: Biomolecular Interaction Analysis Instruments; Biochemical Analyzers; Cell/Colony Counters; Cell Harvesting Systems; Chemical Synthesizer Instruments; CO2 and Carbon Dioxide Transmitters; Electrophoresis Analysis Equipment; Flow Cytometry Instruments; Gas Chromatography Equipment; Cryocooler Systems; Laboratory Incubators, Pumps and Dryers; Liquid Handling Equipment; Mass Spectrometers; Microarray Imaging Microscopes; Microplate Instrumentation.
Trainer Qualifications	The trainer will be knowledgeable and certified by BioMarin's Training Manager personnel prior to delivering PL training.

Attachment 2 - Training Delivery and Curriculum Listing

<i>Delivery Method</i>	Advanced Technology (AT)
Training Type/Level	Planned Course Offerings
<i>Manufacturing Skills / Advanced Technology</i>	
	Analytical Instruments for Temperature / Pressure
	Biochemical Analysis
	Biomolecular Interaction Analysis
	Bioreactor Setup and Production
	Cell Culture and Purification Products
	Cell-Based In-Vitro Potency Assays
	Cell / Colony Analysis
	Electrophoresis Theory
	Flow Cytometry
	Gas Chromatography
	Microarray Imaging
<i>AT Justification</i>	
Need for Advanced Technology Training	Approximately 150 trainees in technical occupations slated to receive AT training. They have previous training and experience in manufacturing operations, but lack specific advanced knowledge. AT will be less than 10% of all training hours delivered under this Agreement. This portion of training will cost more than \$174 per hour, or a total cost of \$515,327 (equivalent to 2,964 hours or 9% of funding) due to the need for highly compensated internal trainers to deliver this AT training, learning content development costs, equipment cost, administration costs and trainee wages/stipends.
Equipment/Processes to be Used	AT courses will be delivered to engineers, technicians, and scientists in BioMarin's own proprietary biotechnology, bio-analytical and electronic measurement methods. This includes inorganic spectroscopy, organic spectroscopy, particle separations, life sciences, and, bio-technology tools and techniques.
Trainer Qualifications	This training will be delivered by in-house trainers, and the trainer-to-trainee ratio will be capped at 1:10 to allow in-depth coverage and personal attention from the instructor.

Attachment 3 - Training Project Characteristics Details

Provided in the table are details on the training characteristics.

Characteristic	Program Summary
Productive Lab (PL)	This proposed training project has PL training. Trainees may produce goods for profit as part of PL training in the courses identified under the curriculum. For PL, the trainer-to-trainee ratio cannot exceed 1:1. In this proposal, maximum hours per trainee are capped at 132 hours (with waiver approval).
Retrainee - Job Creation	<p>The Panel incentivizes job creation. Training for newly-hired employees is reimbursed at a higher rate, and trainees are subject to a lower post-retention wage. The date of hire for trainees is within the three-month period before contract approval, or within the term of the contract. Trainees are hired into “net new jobs” as a condition of contract.</p> <p>Substantial Contribution and Turnover Rate penalty requirements do not apply. Employer must demonstrate expanded or new facilities, new equipment or machinery, expanded business capacity or other measureable investment in hiring workers and expanding their California workforce.</p>
Advanced Technology (AT)	This proposed training project has AT training. For AT, the trainer-to-trainee ratio cannot exceed 1:10.
Computer-Based Training (CBT)	CBT is capped at 50% of total training hours, per trainee.
Substantial Contribution (SC)	BioMarin is a repeat contractor. The Company was subject to a 15% SC rate during its last ETP Agreement, since funds earned were in excess of \$250,000. BioMarin requests a 15% SC for this Critical Proposal versus 30%.



Training Proposal for:
U.S. Foodservice, Inc.

Agreement Number: ET18-0101

Panel Meeting of: June 23, 2017

ETP Regional Office: San Francisco Bay Area

Analyst: C. Hoover

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Goods Movement Transportation/Logistics Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Alameda	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 2,000	U.S.: 25,000	Worldwide: 25,000
<u>Turnover Rate:</u>	10%		
<u>Managers/Supervisors:</u> (% of total trainees)	8%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	-	(High Earner Reduction)	=	Total ETP Funding
\$255,150		\$0		\$0		\$255,150

In-Kind Contribution:	100% of Total ETP Funding Required	\$270,000
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Commercial Skills, Computer Skills	315	8-200	0	\$810	\$17.63
				Weighted Avg: 45			

Minimum Wage by County: \$17.63 per hour for Alameda County.

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

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

Up to \$1.63 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Administration/Support Staff	\$16.00 - \$30.95	85
Production Staff	\$17.00 - \$39.41	202
Technical Staff	\$32.86 - \$38.46	3
Supervisor	\$31.00 - \$41.53	5
Manager	\$41.38 - \$66.98	20

INTRODUCTION

Established in 1989, U.S. Foodservice, Inc. (U.S. Foods) (www.usfoods.com) is a distribution company that supplies over 400,000 national, private-label, and signature brand products to more than 250,000 customers nationwide. Customers include restaurants, educational institutions, government facilities, hotels, healthcare institutions and sport stadiums. Its products range from meats, produce, and frozen foods to restaurant equipment and supplies.

U.S. Foods is headquartered in Rosemont, Illinois. The Company includes divisions in Northern and Southern California, and has more than 70 locations throughout the nation. Training under this Agreement will only include one California facility in Livermore, under the Northern California division.

U.S. Foods has participated in three previous Agreements, and one project within the last five years. The prior project targeted 246 incumbent workers who received training in Business, Computer and Commercial Skills; and a Driver Training Program. This proposal is broader in size and scope. Even though the same type of training is being offered, this proposal's courses were not delivered under any of the prior projects.

[Note: This division is not involved in the U.S. Foodservice ETP-funded project in Southern California (Corona, La Mirada and Vista locations), ET16-0373. See Active Projects table.]

Substantial Contribution

U.S. Foods is a repeat contractor, which did not earn \$250,000 within the last five years. Therefore, Substantial Contribution does not apply.

Green/Clean Operations

U.S. Foods demonstrates a company-wide commitment to being "green." In 2007, the Company was certified by the Bay Area Green Business Program to be the first food service company in the nation to achieve Green Business Certification.

PROJECT DETAILS

Need for Training

U.S. Foods became a public company on May 26, 2016, and is now trading on Nasdaq as USFD. After going public, U.S. Foods centralized operations into regional hubs and the Northern California division experienced significant structural changes. U.S. Foods' location in Livermore is now a hub for Northern California and Northern Nevada. Responsibilities and practices that were once split have now been consolidated to Livermore. Employees were relocated from Nevada to California and new local employees were hired, increasing the Livermore workforce by an estimated ten percent.

The process of going public has had a significant impact on how the Company approaches its strategy for growth. This includes process centralization, shared resource management and cross-training. ETP funding is needed to integrate the new operational model and successfully manage the increased volume of work at the Livermore regional hub.

Training Plan

Training will be delivered via Class/Lab and E-Learning by in-house instructors and vendors as outlined below:

Business Skills (50%): Training will be offered to all occupations. Administration/Support Staff, Supervisors and Managers need training to provide high-quality customer service. Administration/Support Staff and Managers will coordinate with Production and Technical Staff in Managing Diverse and Complex Accounts' course to cross-train. In addition, this training will cover Collaborative Team Dynamics to enhance internal communication and relations between team members to develop communication strategies.

Commercial Skills (22%): Training will be offered to Administration/Support and Production Staff. This training will cover Business Development & Merchandizing, Promotional Techniques and Social Media Methods courses. Training will focus on the purchasing trends and how to target products and promotions.

Computer Skills (28%): Training will be offered to all occupations. Staff will receive training on Microsoft Office 365. Supervisors, Managers, Administration/Support and Technical Staff will receive training on Salesforce.com. In addition, Administration/Support, Technical and Production Staff will receive training on new software including ChowNow, Averro, EDGE, My Kitchen, Precima and Voxware.

These digital platforms allow U.S. Foods to stay competitive by giving the Company's customers access to its state-of-the-art tools to help manage/optimize their own businesses. Since customers may be interacting with multiple departments, customer relationship management

training will help U.S. Foods optimize their customers' time while coordinating food and non-food business.

Commitment to Training

ETP funds will not displace the existing financial commitment to training. U.S. Foods spends \$125,000 annually per facility in California. On-going training includes basic skills, employee orientation, Lean manufacturing, food safety and cross-training courses. Past training included ad hoc training, pilot programs for the on-going training courses listed above and training based off of the previous ETP-funded training from past Agreements. All training is mandatory. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

The Human Resources team, an Area HR Business Partner and the third-party administrative subcontractor - Prospect Consulting Group, Inc. will coordinate to oversee all training. Prospect Consulting Group will be responsible for the ETP administrative duties.

Impact/Outcome

ETP funding will enable U.S. Foods to meet customer and industry demands, especially as needed to implement its growth strategy. Training will continue beyond the ETP program creating promotional opportunities and assistance to customers mirroring its operations.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by U.S. Foods-SoCal under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET16-0373	\$351,300	3/7/16 – 3/6/18	390	712	0

Based on ETP Systems, 13,336 reimbursable hours have been tracked for potential earnings of \$240,506 (69% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to and in progress through December 2017.

PRIOR PROJECTS

The following table summarizes performance by U.S. Foods under an ETP Agreement that was completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET13-0167	Livermore	10/8/12 – 10/7/14	\$169,248	\$169,248 (100%)

DEVELOPMENT SERVICES

Prospect Consulting Group, Inc. in San Francisco assisted with development for a flat fee of \$9,000.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined

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

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- + Financial Skills & Reporting
- + Territory Knowledge & Micro Markets
- + Business Administration
- + Collaborative Team Dynamics
- + Managing Diverse & Complex Accounts
- + Operational Leadership Advancement Skills

COMMERCIAL SKILLS

- + Business Development & Merchandising
- + Promotional Techniques
- + Social Media Methods & Management

COMPUTER SKILLS

- + New Technology (Software Training)
 - o Averro
 - o ChowNow
 - o EDGE
 - o Microsoft Suite 365 (Intermediate/Advanced)
 - o My Kitchen
 - o Precima
 - o Salesforce.com
 - o Voxware
 - o Yammer

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



Training Proposal for:

7173 North Sharon Avenue Operating Company, LLC dba San Joaquin Rehabilitation Hospital

Agreement Number: ET18-0108

Panel Meeting of: June 23, 2017

ETP Regional Office: Sacramento

Analyst: K. Smiley

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate SET Medical Skills Training HUA	Industry Sector(s):	Healthcare Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Marin, San Francisco, Fresno, San Diego, San Bernardino, Shasta, Sacramento	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 2,500	U.S.: 10,000	Worldwide: 10,000
<u>Turnover Rate:</u>	3%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$303,750		\$0	\$0		\$303,750

In-Kind Contribution:	100% of Total ETP Funding Required	\$900,000
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate SET Medical Skills	MS-Clinical w/Preceptor, MS-Didactic, Cont. Imp., Computer Skills	215	8-200	0	\$810	\$22.04
				Weighted Avg: 45			
2	Retrainee Priority Rate SET Medical Skills HUA	MS Clinical with Preceptor, MS Didactic, Continuous Improvement, Computer Skills	160	8-200	0	\$810	*\$13.50
				Weighted Avg: 45			

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

Minimum Wage by County: Job Number 1(SET/Priority Industry): \$22.04 per hour
Job Number 2 (SET/HUA): \$13.50 per hour in Fresno, San Bernardino and Shasta 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 \$2.54 per hour may be used to meet the Post-Retention wage for Job Number 1.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Registered Nurse	\$35.00-\$52.00	170
Licensed Vocational Nurse	\$19.50-\$29.00	30
Therapist	\$35.00-\$52.00	15
Job Number 2		
Registered Nurse	\$35.00-\$52.00	100
Licensed Vocational Nurse	\$19.50-\$29.00	20
Therapist	\$35.00-\$52.00	20
Therapy Assistant	\$13.50-\$19.00	5
Certified Nursing Assistant	\$13.50-\$19.00	15

INTRODUCTION

Founded in 2004 and located in Fresno, 7173 North Sharon Avenue Operating Company, LLC dba San Joaquin Rehabilitation Hospital (SJR) is a skilled nursing facility. SJR is owned and managed by Vibra Healthcare, LLC (Vibra), headquartered in Pennsylvania. SJR's services include skilled nursing and clinical care for patients. SJR specializes in patient care for people who have suffered amputation, brain injury, orthopedics surgery, hip fractures, joint replacements, major multiple trauma's, Osteoporosis, neurological disorders, Multiple Sclerosis, Parkinson disease, stroke and spinal cord injury.

Seven Vibra-owned facilities will participate in training. SJR will hold the contract.

- Vibra Hospital of Sacramento, LLC in Folsom
- Vibra Hospital of San Bernardino, LLC in San Bernardino
- 1125 Sir Francis Drake Boulevard Operating Company, LLC dba Kentfield Rehabilitation and Specialty Hospital in Kentfield
- Vibra Hospital of Northern California, LLC in Redding
- Vibra Hospital of San Diego, LLC in San Diego
- Kentfield Hospital of San Francisco, LLC in San Francisco

All of these facilities are eligible for priority-industry funding as Healthcare facilities under Special Employment Training (SET) for frontline workers.

PROJECT DETAILS

This will be Vibra's third Agreement and the third in five years. Previous agreements focused on new facilities opening in Fresno, Redding, Kentfield and San Bernardino. Training in this proposal will focus on recent healthcare industry changes. SJR and its affiliates will train staff on the Affordable Healthcare Act, Center for Medicare and Medicaid Services (CMS) Nursing home rating system, and in Nursing Homes Compare's (NHC) system

The Affordable Care Act has resulted in new quality standards, decreased reimbursement for services, increased patient population, and increased high acuity patients. Training is required to ensure worker have the skills and knowledge to manage more patients with a higher level of acuity. Training will improve clinical outcomes and reduce the re-admittance of patients.

In 2016, the CMS unveiled major changes to the NHC's five-star rating system (a system that allows consumers to compare information about nursing facilities) with new quality measures that must be integrated under the new system. The NHC contains quality of care and staffing information for all Medicare- and Medicaid-participating skilled nursing homes. SJR and affiliates will need training to ensure staff are meeting the new quality standards set by CMS and maintain a proficient score under the NHC guidelines. Ensuring facilities receive a satisfactory NHC score means the Hospital can continue to serve Medicare and Medicaid patients. The NHC score is also available to perspective clients and a high score can increase the company's client base. SJR's training plan will ensure staff meet quality standards set by CMS and provide first-rate care to patients.

Training Plan

Training will be delivered using a combination of internal and external training matter 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 (40%): All occupations will receive classroom training to supplement clinical and preceptor training. Courses include Care of the Stroke Patient, Central Lines Management, Chest Tube Care and Management, Code Blue Response and Procedures, Conscious Sedation, and Critical Care Nursing Skills to ensure trainees have the knowledge of new nursing practices and procedures.

Medical Skills Training – Clinical with Preceptor (40%): All occupations will receive bedside medical skills training with a Preceptor. All trainees will train with Preceptors to validate skills, and become familiar with patient acuity levels and the level of care that the Hospital requires. Courses include Patient Assessment & Care, Geriatric Nursing Skills, Medical/Surgical Nursing Skills, Pre and Post-Operative Care and Orthopedic Nursing Skills.

Computer Skills (5%): Training will be offered to all occupations in the new Patient Billing and Accounts Receivable system to accurately enter and retrieve patient information. Staff will also receive training on Microsoft Office and Excel.

Continuous Improvement (15%): Training will be offered to all occupations in multiple skills such as team building, customer service, and Leadership Skills. Courses including Conflict Resolution Skills, Organization and Time Management Skills and Patient and Family Centered Care Skills.

Special Employment Training

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

➤ **Wage Modification**

The 215 trainees in Job Number 1 are employed in a Priority Industry and qualify for a wage modification up to 25% below the Statewide Average Hourly Wage. SJR requests this wage modification, from \$29.38 per hour to \$22.04 per hour.

High Unemployment Area

All trainees in Job Number 2 work in regions with unemployment exceeding the state average by at least 25%. Trainees qualify for the Standard Wage rather than the SET Statewide Average Hourly Wage. Additionally, the Standard Wage may be modified by up to 25% if the post-retention wage reflects an increase from wages earned at the start-of-training.

SJR requests this wage modification from the ETP's Standard Minimum Wage to the HUA Minimum Wage (from \$16.16 per hour to \$13.50 per hour).

Commitment to Training

The Company's current training budget is approximately \$75,000 per facility. Training programs include new hire orientation, sexual harassment prevention, safety, annual computer skills, skills updates and in-service 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**

SJR's staff will coordinate training, maintain ETP documents, and coordinate training with each participating location. The Regional Director of Human Resources (HR) will oversee the implementation of the training project. Each participating location will have a Director of Staff Development report training performance to the Regional Director of HR, weekly. SJR has also contracted with National Training Systems Inc. to support project administration. The Company has a training plan in place and are ready to begin training as soon as approved.

Substantial Contribution

Substantial contribution does not apply to the proposed ETP Agreement. None of SJR's participating facilities have earned more than \$250,000 within the last five years. SJR facilities earned a total of \$682,865 in ETP funding, of which \$228,620 was for Job Creation and the rest was earned for retraining at different facilities.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET14-0154	Fresno	9/01/13 – 8/31/15	583,938	\$302,302 (52%)
ET11-0341	Fresno	6/27/11 – 6/26/13	\$380,563	\$380,563 (100%)

During the ET14-0154 Agreement, Vibra lost two key employees coordinating and supporting the ETP training program. The Chief Clinical Officer and Regional Vice President of Operations passed away unexpectedly during the term of the Agreement. Vibra was forced to shift focus from training to recruiting for new leadership. Vibra has since filled these key positions and is committed to the training plan.

DEVELOPMENT SERVICES

National Training Systems Inc. (NTS) in Ladera Ranch assisted with development for a flat fee of \$19,939.

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:

MEDICAL SKILLS TRAINING – CLINICAL PRECEPTOR**High Observation Unit Training**

- Patient Assessment and Care
- Critical Care Nursing Skills
- Ventilator & Tracheotomy Care
- Hemodynamic Monitoring
- Total Parenteral Nutrition

Intensive Care Unit/Critical Care Unit Training

- Critical Care Nursing Skills
- Patient Assessment & Care
- EKG & Cardiac Monitoring
- Intra-Aortic Balloon Pump Therapy
- Intracranial Pressure Monitoring & Ventriculostomy
- Hemodynamic Monitoring
- Pre and Post-Operative Care
- Care of Trauma Patient
- Management of the Renal Transplant Surgical Patient
- Ventilator & Tracheotomy Care

Long Term Care Unit

- Patient Assessment & Care
- Geriatric Nursing Skills
- Medical/Surgical Nursing Skills
- Pre and Post-Operative Care
- Orthopedic Nursing Skills
- Oncology Nursing Skills
- Hospice Nursing Skills

Rehabilitation Services Unit Training

- Patient Assessment & Care
- Medical/Surgical Nursing Skills
- Occupational Therapy Skills
- Physical Therapy Skills
- Pre and Post-Operative Care
- Post-Orthopedic Surgery Nursing Skills
- Post-Trauma Injury Nursing Skills
- Post-Neurological Injury Nursing Skills
- Speech & Language Pathology Skills

Telemetry Unit Training

- Patient Assessment & Care
- Critical Care Nursing Skills
- Pre and Post-Operative Care

- Cardiac Rehabilitation
- Care of the Cardiac Patient
- Care of Bariatric Patients
- EKG & Cardiac Monitoring
- Hemodynamic Monitor
- Telemetry Nursing Skills

MEDICAL SKILLS TRAINING – DIDACTIC

- Acute Myocardial Infarction
- Advanced Cardiac Life Support
- Advanced Nutrition for Rehabilitation
- Amputee Care
- Arterial Blood Gas Interpretation
- Basic Life Support
- Body Mechanics
- Cardiac Rehabilitation
- Care of Bariatric Patient
- Care of the Cardiac Patient
- Care of the Neurosurgical Patient
- Care of Patient on the Autism Spectrum
- Care of the Stroke Patient
- Central Lines Management
- Chest Tube Care & Management
- Code Blue Response & Procedures
- Conscious Sedation
- Critical Care Nursing Skills
- Decontamination Procedures
- Diabetes Care & Management
- Dysrhythmia Recognition & Interpretation
- Educating the Patient & Family
- EKG & Cardiac Monitoring
- Equipment Skills (IV pumps, cardiac telemetry, vital signs, pulse-oximeter, ventilators, specialty beds and mattresses, etc.)
- Evidence-Based Practices
- Gastrointestinal Assessment and Management
- Hemodynamic Monitoring
- High Observation Unit Training
- Infection Control
- Intravenous Insertion & Therapy
- Kinetic Therapy
- Laboratory Skills
- Medication Administration & Management
- Moderate Sedation
- Nursing Diagnosis Skills
- Nursing Process Skills
- Occupational Therapy Skills
- Orthopedic Nursing Skills
- Ostomy & Continence Care
- Pain Management (Acute & Chronic)
- Patient Assessment & Care

- Patient Fall Prevention
- Pharmacy Skills
- Physical Therapy Skills
- PICC Line Insertion
- Prevention of Pressure Ulcers
- Pre and Post-Operative Care
- Prosthetic Limb Care
- Rapid Response Skills
- Renal Assessment & Management
- Respiratory Assessment & Care
- Restraints
- Shock Prevention and Management
- Speech & Language Pathology Skills
- Telemetry Nursing Skills
- Total Parenteral Nutrition
- Transfer Techniques
- Ventilator and Tracheotomy Care
- Wound & Skin Care

CONTINUOUS IMPROVEMENT

- Case Management/Discharge Planning
- Charge Nurse Training/Frontline Leadership Skills
- Communications Skills
- Conflict Resolution Skills
- CORE Measures
- Crisis Prevention Intervention
- Critical Thinking Skills
- Customer Service Skills
- Documentation Skills
- Organization and Time Management Skills
- Patient and Family Centered Care Skills
- Preceptor Skills (train-the-trainer)
- Performance & Quality Improvement
- Preventing Hospital Readmission
- Team Building Skills
- Utilization Review

COMPUTER SKILLS

- Microsoft Office/Excel Skills (Intermediate/Advanced)
- Patient Billing and Accounts Receivable Tracking Skills
- Electronic Medical Records Application 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.



TRAINING PROPOSAL FOR
Amy's Kitchen, Inc.
17- 0683

Panel Meeting Date: 06/23/2017
Regional Office: Sacramento Regional Office
Analyst Name: Dongallo, Jesse
Type of Proposal: Single Employer Contract (SE)
Funding Source: Out-of-State Competition (OSC)

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$514,080.00			
Program & Admin Cost	Support Cost	Substantial Contribution (\$ / %)	Total In-Kind
\$514,080.00	N/A	N/A	\$702,995.00

APPLICANT PROFILE

Company Summary	Founded in 1988, Amy's Kitchen, Inc. (Amy's Kitchen) is a family-owned, privately held company that manufactures organic and non-GMO vegetarian based foods. Headquartered in Petaluma, Amy's Kitchen has six California locations in Petaluma, Sutton, Santa Rosa and Sacramento.
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Industry Sector(s)	Manufacturing
Priority Industry	Yes
No. of Employees (Applicant)	State: <u>1,094</u> US: <u>2,594</u> World Wide: <u>2,601</u>
Turnover Rate (Applicant)	1%
Repeat Contractor	No
High Unemployment Area	No
Unions	No

TRAINING PROFILE

<i>Training Objective</i>	Amy's Kitchen has experienced significant growth in domestic and international markets. With a yearly average of 14 new products introduced to the market, along with expanding locations, employees require extensive training to increase productivity, efficiency and technical expertise.
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Training is summarized below. Additional details are provided in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# of Trainees	Reimbursement Rate	Avg. Hours	Cost Per Trainee	Min – Max Hour
1	Retrainees	975	\$18.00	29	\$522	8 – 200
2	Retrainees, Veterans	5	\$22.00	35	\$770	8 – 200
3	Retrainees, Job Creation	2	\$20.00	32	\$640	8 – 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details on the proposed Training Project.

1. Company Background

Founded in 1988 and headquartered in Petaluma, Amy's Kitchen (<http://www.amys.com>), makes more than 250 organic products including: frozen entrees, burritos, wraps and bowls, soups, beans, salsa and pasta sauce, cakes, cookies, candy bars and non-dairy frozen desserts. Customers include grocery retailers nationwide. Inspired by healthy living options, Amy's Kitchen line of foods is prepared from organic ingredients with no additives or preservatives. All of Amy's products are vegetarian and do not contain meat, eggs, seafood, peanuts, GMOs or hydrogenated fats and oils.

Training will take place at Amy's Kitchen's six California manufacturing, warehouse and corporate locations. This will be Amy's Kitchen'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.

<i>Purpose of Training</i>	<p>Amy's Kitchen faces strong out-of-state competition. To remain competitive, training will focus on Manufacturing Skills to increase production efficiency, capacity, and quicker service to customers. Amy's Kitchen's LEAN transformation will continue with a more complete and advanced module of training.</p> <p>Employee training and development is needed to ensure the quality and production of food, and meet Federal Drug Administration compliance standards.</p> <p>Amy's Kitchen is also transitioning into a new Enterprise Resource Planning (ERP) system to replace the Company's antiquated computer system. This new system will enable staff to analyze, manage, and identify areas of improvement. Training will cover customized functions and processes, such as generating daily reports, performing systems updates, and monitoring operational efficiencies.</p>
<i>Training Infrastructure and Administrative Plan</i>	<p>Amy's Kitchen training infrastructure consist of four training managers solely committed to the coordination of all training efforts, including scheduling training, providing trainee enrollment data, verifying training and retention completion, participating in ETP monitoring activities and ensuring compliance with all ETP requirements.</p> <p>There are 15 skill-specific trainers dispersed amongst all training locations. These trainers provide role-specific training to ensure all employees receive the necessary skills. In addition, trainees will also receive guidance from a team of 18 manufacturing training coordinators and leads.</p> <p>For the past six years, Amy's Kitchen has followed a very detailed training schedule supported by a Learning Management System (LMS) that provides special upgrade features, such as Coach iPad. The Company applied this upgrade to allow trainers and leads to continue training delivery as needed. Amy's Kitchen stays committed to effective training and is ready to begin upon approval.</p>
<i>Marketing Plan</i> (MEC Only)	N/A
<i>Support Cost</i>	N/A

Description (MEC Only)	
Substantial Contribution Description	N/A

3. Sample Curriculum

Provided below is a summary of the methods by which training will be delivered including a sample of the courses that will be offered.

Each of the Trainee groups will be able to take courses under the various delivery methods.

Delivery Method	Classroom/Simulated Laboratory
Training Type/Level	Sample Classes
Business Skills	Effective Training Skills
Computer Skills	Microsoft Dynamics
Continuous Improvement Skills	LEAN Principles
Management Skills	Manufacturing Leadership Coaching
	Project Management
Manufacturing Skills	CCP: Metal Detector
	PC: PreOp Inspection
	PC: Raw Material COA
Hazardous Waste Skills	Chemical Safety Training
	Hazard Communication
Delivery Method	E-Learning – Instructor Led/Distance Learning
Training Type/Level	Sample Classes
Manufacturing Skills	Food Safety Training for Office Staff
Delivery Method	Electronic Learning/Computer Based Training (CBT)
Training Type/Level	Sample Classes
Manufacturing Skills	Allergens
	Food Safety & Quality Policy
	Product Claims & Certifications

4. Additional Company or Training Project Details

4.1 Program Waivers

The next table lists the various waivers and supporting justifications for training that apply to this proposed Training Project.

Waivers/Justification Type	Summary
Retention Period for Veterans	Amy's Kitchen will train five Veterans who are eligible for 500 retention Hours within 272 consecutive days, working full time with one or more employers.

4.2 Subcontractor Summary

Amy's Kitchen has retained the services of the following Subcontractor(s).

Subcontractor Type	Subcontractor Name	City	Service Cost
Development	Economic Incentives Advisory Group	Phoenix	\$5,000.00
Administration	None Identified		
Training	None Identified		

4.3 Previous ETP Project Summary

None

4.4 Supporting Panel Proposal Documentation

Attachments 1, 2 and 3 provide additional details on the training, the curriculum, and associated program characteristics related to this proposal.

Attachment 1 – Group and Job Title Details

The proposed Training Project includes training for the following Trainees, organized by training group.

Group #: 1 – Retrainees				
County		ETP Minimum Wage		
Sonoma		\$16.16		
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post-Retention Wage
Sonoma County				
IT Staff	16	\$40.00 - \$60.00	\$0.00	\$40.00
Kitchen Staff	96	\$13.00 - \$27.00	\$3.16	\$16.16
Maintenance Staff	37	\$15.00 - \$43.00	\$1.16	\$16.16
Managers and Supervisors	40	\$26.00 - \$55.00	\$0.00	\$26.00
Administration Staff	112	\$25.00 - \$50.00	\$0.00	\$25.00
Preventative Control Qualified Individuals	20	\$25.00 - \$48.00	\$0.00	\$25.00
Production and Packing Staff	343	\$13.00 - \$26.00	\$3.16	\$16.16
QA Staff (incl QARM)	32	\$13.00 - \$23.73	\$3.16	\$16.16
Sanitation Staff	135	\$13.00 - \$25.00	\$3.16	\$16.16
Team leads	66	\$15.00 - \$30.00	\$1.16	\$16.16
Warehouse Staff	78	\$14.00 - \$25.50	\$2.16	\$16.16
Group #: 2 – Retrainees, Veterans				
County		ETP Minimum Wage		
Sonoma		\$16.16		
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post-Retention Wage
IT Staff	2	\$40.00 - \$60.00	\$0.00	\$40.00
Maintenance Staff	1	\$15.00 - \$43.00	\$1.16	\$16.16
Production & Packing Staff	2	\$13.00 - \$26.00	\$3.16	\$16.16

Attachment 1 – Group and Job Title Details

Group #: 3 – Retrainees, Job Creation				
County		ETP Minimum Wage		
Sacramento		\$13.72		
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post-Retention Wage
Quality Assurance Raw Materials (QARM)	2	\$13.76 – \$17.62	\$0.00	\$13.76

Attachment 2 – Training Delivery and Curriculum Listing

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

<i>Delivery Method</i>	<i>Classroom/Simulated Laboratory</i>
Training Type/Level	Planned Course Offerings
<i>Business Skills</i>	
	Effective Training Skills
<i>Computer Skills</i>	
	ERP system - Microsoft Dynamics
<i>Continuous Improvement Skills</i>	
	LEAN principles
<i>Management Skills (Managers/Supervisors Only)</i>	
	Leadership Essentials & Development
	Manufacturing Leadership Coaching
	Project management
	Supervisor Training & Resources
<i>Manufacturing Skills</i>	
	Allergens
	Amy's Food Management System
	Bacteria Basics
	Bloodborne Pathogens
	CCP: Cooking KSA
	CCP: Metal Detector
	Environmental Awareness Waste Prevention
	Environmental Monitoring
	Food Facility Security
	Food Safety & Quality Policy
	Global Food Safety Initiative & Safe Quality Food
	Good Documentation Practices
	Good Manufacturing Practices
	Listeria
	Maintenance Skills Training
	Overview of Preventative Controls
	PC: Barcode Readers
	PC: Cooling
	PC: Line Clearance
	PC: Material Usage
	PC: PreOp Inspection
	PC: Raw Material COA
	PC: Raw Material Inspection

Attachment 2 – Training Delivery and Curriculum Listing

<i>Delivery Method</i>	<i>Classroom/Simulated Laboratory</i>
Training Type/Level	Planned Course Offerings
	PCQI
	Powered Industrial Truck Training and Certification
	Preventing Food Contamination
	Product Claims & Certifications
	Sanitation & Housekeeping
<i>Hazardous Waste Skills</i>	
	Chemical Safety Training
	Hazard Communication
	Hazardous Waste

<i>Delivery Method</i>	<i>E-Learning – Instructor Led/Distance Learning</i>
Training Type/Level	Planned Course Offerings
<i>Manufacturing Skills</i>	
	Food Safety Training for Office Staff

<i>Delivery Method/Level</i>	<i>Electronic Learning/Computer Based Training (CBT)</i>	
Training Type/Level	Planned Course Offerings	Standard Hours
<i>Manufacturing Skills</i>		
	Allergens	.5
	Amy's Food Safety Management System	.5
	Bacteria Basics	.5
	Environmental Monitoring	.5
	Food Facility Security	.5
	Food Safety & Quality Policy	.5
	Global Food Safety Initiative & Safe Quality Food	.5
	Good Manufacturing Practices - GMPs	.5
	Listeria	.5
	Preventing Food Contamination	.5
	Product Claims & Certifications	.5
	Sanitation & Housekeeping	.4

Attachment 3 - Training Project Characteristics Details

Provided in the table are details on the training characteristics.

Characteristic	Program Summary
Retrainee - Job Creation	<p>Amy's Kitchen has committed to hiring two employees to support increased business. These trainees will be hired into "net new Jobs" as a condition of the contract. With a 1% turnover ratio, the Company displays continued staff growth and stability.</p> <p>The Panel provides incentives to companies that commit to hiring new employees including a higher Reimbursement Rate:</p> <ul style="list-style-type: none"> • \$20 for all delivery methods (Class/Lab; Productive Lab; E-learning) with the following exceptions – • \$22 for AT (training Level) • \$8 for CBT (delivery Type) <p>The date of hire for trainees is within the three-month period before contract approval, or within the term of the contract. Trainees are hired into "net new jobs" as a condition of contract. Substantial Contribution and Turnover Rate penalty requirements do not apply. Employer must demonstrate expanded or new facilities, new equipment or machinery, expanded business capacity or other measureable investment in hiring workers and expanding their California workforce. A trainee whose employment is "Temp-to-Permanent", "seasonal", or "part-time" may be considered newly-hired, but employment retention cannot begin until trainee is a permanent full-time employee on Contractor payroll.</p>
Retrainees – Temp to Permanent	<p>Amy's Kitchen currently has 38 temporary trainees expected to be permanently employed in the following occupations: Building & Grounds Cleaning & Maintenance Occupations, Computer and Mathematical Occupations, Food Preparation and Serving Related Occupations, Management Occupations, Office and Administrative Support Occupations, Production Occupations. Trainees may be retained through a temporary agency; but trainee must be hired into full-time, permanent employment after training.</p> <p>Temporary workers will have been employed for at least 90 days prior to the start-of-training, whether by the Contractor or the Temporary Agency. This is consistent with trainee eligibility at UI Code Section 10201(c). These trainees must be determined eligible to participate in ETP funded training while on payroll with the temporary agency. The retention and post-retention wage requirements cannot be met until after trainees have been hired. Until then, ETP will not issue payments.</p>
Retrainee - Veterans	<p>To help provide veterans with necessary skills to enter the workforce and improve opportunities for advancement in high wage, secure jobs, the Panel incentivizes training for veterans. Training for veterans is reimbursed at a higher rate. Training hours may consist of up to 50% literacy or other basic skills training. Full-time employment is required for a minimum of 30 hours per week during 90-day retention period (or 500 hours within 272 days). The Retrainee Cap on hours (200) may be modified.</p>



TRAINING PROPOSAL FOR
Caber Enterprises, Inc.
17- 0722

Panel Meeting Date: 06/23/2017
Regional Office: Sacramento Regional Office
Analyst Name: Dongallo, Jesse
Type of Proposal: Single Employer Contract (SE)
Funding Source: Special Employment Training (SET)

FUNDING OVERVIEW

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

\$558,760.00	N/A	N/A	\$658,000.00

APPLICANT PROFILE

	Headquartered in Visalia, Caber Enterprises, Inc. dba Mission Care Group (Caber) is a company that provides nursing and rehabilitation services to geriatric and post-acute patients. In addition to the Visalia headquarters, Caber operates 3 rehabilitation, skilled nursing and post-acute care centers in Visalia, Tulare and Hanford.
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Industry Sector(s)	Healthcare		
Priority Industry	Yes		
No. of Employees (Applicant)	State: <u>300</u>	US: <u>300</u>	World Wide: <u>300</u>
Turnover Rate (Applicant)	12.00%		
Repeat Contractor	Yes		
High Unemployment Area	Yes		
Unions	No		

TRAINING PROFILE

<i>Training Objective</i>	Training objective will be focused on improving processes, maintaining compliance with constant legislative changes, satisfy increasing demands for high quality care, implement technological enhancements, certification on 5-star programs and expand on full time staff.
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Training is summarized below. Additional details are provided in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# of Trainees	Reimbursement Rate	Avg. Hours	Cost Per Trainee	Min – Max Hour
1	Retrainee (HUA) JOB CREATION Priority Rate	76	\$20	108	\$2,220.00	8-200
2	RETRAINEE (HUA) Priority Rate	207	\$18	100	\$1,800.00	8-200
3	Retrainee (HUA) VETERAN Priority Rate	10	\$22	100	\$2,200.00	8-200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details on the proposed Training Project.

1. Company Background

Founded in 1991, Caber operates several rehabilitation and skilled nursing and post-acute care centers in Visalia, Tulare and Hanford. The Company employs 300 professionals providing 24-hour care within cumulative 210 beds with rehabilitation, recovery, nursing, long term care, post-acute services to patients following illness, surgery and injury.

There will be four Caber facilities participating in training:

- Caber Enterprises Inc. (Headquarters) in Visalia
- Delta Nursing and Rehabilitation Hospital, Inc. in Visalia
- Kings Nursing and Rehabilitation Hospital, Inc. in Hanford
- Tulare Nursing and Rehabilitation Hospital, Inc. in Tulare

All these facilities are eligible for priority-industry funding as a Healthcare facility.

2. Current Training Project Details

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

<i>Purpose of Training</i>	<p>This will be Caber's second Agreement, and the second in the last five years. During the first ETP Agreement (ET15-0418), the Company's training focused cost-effective programs and nursing skills to improve customer satisfaction. That Agreement trained 300 employees at the Company's four California facilities. This proposal will include employees that received training in the prior ETP project. However, these trainees will not receive duplicate training. Training will expand upon the previous proposal.</p> <p>With the constant changing medical industry requirements and programs associated with the Affordable Care Act and Centers of Medicare & Medicaid Services (CMS), Caber needs to adapt with the changes. As of March 2016, the CMS unveiled major changes to Nursing Home Compare, a care facility five-star rating system, with new quality measures that must be integrated under the new system. The five-star quality rating system is a tool to help consumers select and compare skilled nursing centers which is readily accessible on the internet. As a result, Caber has committed to align new quality improvement training to help maintain its high ratings, standards of patient care, and key partnerships with other healthcare providers.</p> <p>In regards to a recent healthcare partnership, Caber has committed to hiring 76 employees to support an expanding workload. Caber was awarded the Providence Medicare/Medicaid contract. This contract will increase patient volume by 30% within the next nine months, along with continual growth within the next two years. Additional trainees will be hired into "net new jobs" as a condition of the contract.</p> <p>In 2014, the Caber began implementing Point Click Care (PCC), which is an Electronic Medical Record Software. This system will allow Caber to provide an integrated clinical and financial electronic medical record along with its Customer Relationship Management system (CRM) across the post-acute care continuum. Although originally planned to be implemented in 2014, the Company has begun installation in July 2016 and will continue to all facilities through 2017. Training for the new software system has begun and is projected to continue to be delivered to all staff in the next 24 months or longer, until all software updates have been completed.</p>
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	<p>The Panel has established a reimbursement rate for nurse upgrade training, recognizing the higher cost of delivery for the Clinical with Preceptor model. This blended rate, \$22 per hour, will apply to both the Didactic and Clinical with Preceptor models of delivery.</p> <p>Medical Skills training will be delivered to 232 RNs, LVNs, CNAs and select Medical Staff, Medical Therapy and Supervisors.</p>
Training Infrastructure and Administrative Plan	<p>Caber has a project manager and training coordinator dedicated to coordinating all training efforts, including scheduling training, ensuring the training is tracked under ETP rosters, providing trainee enrollment data, verifying training and retention completion, participating in ETP monitoring activities and ensuring compliance with all ETP requirements.</p> <p>To ensure 100% performance, the Company has restructured both top management and training program facilitation methods. Along with improved training management, the Company has established 6 full time trainers and 20 subsequent trainers involved in clinical preceptor training. Caber has also retained an administrative consultant with ETP experience to assist with meeting program requirements.</p>
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	Caber is a repeat contractor where payment earned did not exceed \$250,000 at a single facility within the past five years. Therefore, Substantial Contribution does not apply.

3. Sample Curriculum

Provided below is a summary of the methods by which training will be delivered including a sample of the courses that will be offered.

Each of the Trainee groups will be able to take courses under the various delivery methods.

Delivery Method	Classroom/Simulated Laboratory
Training Type/Level	Sample Classes
Medical Skills (Didactic)	Psychotropic Medication Management
	Intravenous Therapy
	Behavior Management
Medical Skills (Preceptor)	Dementia care
	Rehabilitation Services
	Skeletal/Orthopedic Conditions
Computer Skills	Elect Med Records Application Skills
	Patient Services Billing Software
Continuous Improvement	Mobility Skills
	Medical Records

4. Additional Company or Training Project Details

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

4.1 Program Waivers

The next table lists the various waivers and supporting justifications for training that apply to this proposed Training Project.

Waivers/Justification Type	Summary
Retention Period for Allied Healthcare	500 hours within 272 days working full time with one employer.
Nurses and Allied Healthcare Full-Time Definition	Full time employment is 35 hours per week. The Company requests 32 hours per week as full-time for allied healthcare occupations only.
HUA Wage	43 trainees in Groups 2 and 3 work in High Unemployment Area (HUA), with unemployment exceeding the state average by 12% The wage may be modified to the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. The trainees in a HUA may receive more hours of basic or literacy skills training (Vocational English as a Second Language), as shown in the Curriculum.

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost
Development	Synergy Management Consultants, LLC	Grass Valley	\$34,000.00
Administrative	Synergy Management Consultants, LLC	Grass Valley	Not to exceed 10% of funding earned

4.3 Previous ETP Project Summary

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned	
				\$	%
ET15-0418	Kings, Tulare	05/04/2015- 05/03/2017	\$424,614	\$331,198	(78%)*

Within the first 14 months of the contract, the previous HR manager experienced challenges managing the training plan. In addition, the last 9 months, Caber merged one of its locations with another. This caused the Company to focus much of their time and resources to relocating staff and patients to their existing facilities. As a result of these challenges, the Company finished at 78% performance.

For the proposed Agreement, a new HR project manager had been hired to implemented a more training focused plan which resulted in a training increase of 175% in the final 7 months of eligible training. To support this training plan, MCG will be utilizing 6 full time trainers, along with 20 subsequent trainers for clinical preceptor training.

4.4 Supporting Panel Proposal Documentation

Provided in Attachments 1, 2 and 3 is additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 1 – Group and Job Title Details

The proposed Training Project includes training for the following Trainees, organized by training group.

Group #1 – Retrainees, Job Creation				
County		ETP Minimum Wage		
Kings County (HUA)		\$ 10.50		
Tulare County (HUA)		\$ 10.50		
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post-Retention Wage
Kings County (HUA)				
Admin Support	1	\$12.00 - \$18.00	\$0.00	\$12.00
CNA	12	\$12.00 - \$14.00	\$0.00	\$12.00
LVN	7	\$19.00 - \$24.00	\$0.00	\$19.00
RN	2	\$35.00 - \$45.00	\$0.00	\$35.00
Supervisor	3	\$25.00 - \$40.00	\$0.00	\$25.00
Tulare County (HUA)				
Admin Support	1	\$12.00 - \$20.00	\$0.00	\$12.00
Admin Support	1	\$12.50 - \$15.00	\$0.00	\$12.50
CNA	8	\$12.00 - \$14.00	\$0.00	\$12.00
CNA	10	\$12.00 - \$14.00	\$0.00	\$12.00
Corp Support	3	\$13.50 - \$25.00	\$0.00	\$13.50
LVN	1	\$12.00 - \$15.00	\$0.00	\$12.00
LVN	6	\$12.00 - \$17.00	\$0.00	\$12.00
LVN	8	\$17.00 - \$25.00	\$0.00	\$17.00
Manager	1	\$25.00 - \$40.00	\$0.00	\$25.00
Medical Staff	1	\$12.50 - \$18.00	\$0.00	\$12.50
RN	1	\$35.00 - \$40.00	\$0.00	\$35.00
RN	1	\$37.00 - \$45.00	\$0.00	\$37.00

Attachment 1 – Group and Job Title Details

Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post-Retention Wage
RN	2	\$35.00 - \$45.00	\$0.00	\$35.00
Supervisor	3	\$28.00 - \$47.00	\$0.00	\$28.00
Supervisor	4	\$28.00 - \$40.00	\$0.00	\$28.00

Group #2 -- Retraitees	
County	ETP Minimum Wage
Kings County (HUA)	\$ 12.12
Tulare County (HUA)	\$ 12.12

Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post-Retention Wage
Kings County (HUA)				
Admin Support	4	\$12.00 - \$15.00	\$0.12	\$12.12
CNA	28	\$12.00 - \$14.00	\$0.12	\$12.12
LVN	15	\$19.00 - \$28.00	\$0.00	\$19.00
Medical Therapy	5	\$25.00 - \$40.00	\$0.00	\$25.00
RN	2	\$36.00 - \$47.00	\$0.00	\$36.00
Supervisor	9	\$25.00 - \$40.00	\$0.00	\$25.00
Tulare County (HUA)				
Admin Support	4	\$12.50 - \$15.00	\$0.00	\$12.50
Admin Support	4	\$12.00 - \$20.00	\$0.12	\$12.12
CNA	28	\$12.00 - \$14.00	\$0.12	\$12.12
CNA	33	\$12.00 - \$14.00	\$0.12	\$12.12
Corporate Office Support	8	\$15.00 - \$30.00	\$0.00	\$15.00
LVN	15	\$12.00 - \$17.50	\$0.12	\$12.12
LVN	15	\$17.00 - \$25.00	\$0.00	\$17.00
Manager	3	\$25.00 - \$50.00	\$0.00	\$25.00
Medical Staff	3	\$13.50 - \$32.25	\$0.00	\$13.50

Attachment 1 – Group and Job Title Details

Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post-Retention Wage
Medical Therapy	5	\$25.00 - \$32.00	\$0.00	\$25.00
RN	2	\$35.00 - \$45.00	\$0.00	\$35.00
RN	2	\$37.00 - \$50.00	\$0.00	\$37.00
RN	3	\$35.00 - \$45.00	\$0.00	\$35.00
Supervisor	7	\$28.00 - \$47.00	\$0.00	\$28.00
Supervisor	12	\$28.00 - \$40.00	\$0.00	\$28.00

Group #3 -- Retrainees, Veterans				
County		ETP Minimum Wage		
Kings County (HUA)		\$ 12.12		
Tulare County (HUA)		\$ 12.12		
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post-Retention Wage
Kings County (HUA)				
CNA Vet	2	\$12.00 - \$14.00	\$0.12	\$12.12
RN Vet	1	\$35.00 - \$45.00	\$0.00	\$35.00
Tulare County (HUA)				
CNA Vet	3	\$12.00 - \$14.00	\$0.12	\$12.12
LVN Vet	2	\$12.00 - \$18.00	\$0.12	\$12.12
Manager Vet	1	\$35.00 - \$35.00	\$0.00	\$35.00
RN Vet	1	\$35.00 - \$45.00	\$0.00	\$35.00

Attachment 2 – Training Delivery and Curriculum Listing

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

<i>Delivery Method</i>	<i>Classroom/Simulated Laboratory</i>
Training Type/Level	Planned Course Offerings
<i>Medical Skills (Didactic)</i>	
	Administration of Antimicrobial Agent
	Infection Control
	Basic Life Support
	Body Mechanics
	Patient Transfer Techniques
	Medical Equipment Skills
	Advanced Cardiac Life Support
	Change of Condition Management
	Interdisciplinary Team Process
	Pain Mgmt (Acute and Chronic)
	Intravenous Therapy
	Enteral Feeding Tube Management
	Respiratory Care
	Restorative Nursing
	Wound Management
	Advanced Assessment Skills
	Diabetic Management
	Urinary Mgmt Foley Catheter, In/Output
	Resident and Family Education
	Medication Administration Mgmt
	Restraint and Restraint Reduction
	Behavior Management
	Psychotropic Medication Management
	Patient Assessment & Care
	Physical, Occupation Speech Therapy
	End of Life Care
	Patient Fall Prevention
	Dementia/Alzheimer's
	Neurovascular System
	Residents with Special Needs
	Gastrointestinal System
	Laboratory
	Lab Electrolyte Imbalance
	Lab Arterial Blood Gas Interpretation
	Cardiac Conditions

Attachment 2 – Training Delivery and Curriculum Listing

<i>Delivery Method</i>	<i>Classroom/Simulated Laboratory</i>
Training Type/Level	Planned Course Offerings
	Neurological Conditions
	Resident Emergency Response
	Skeletal/Orthopedic Conditions
	Incontinence Management
	Pro Act Training
<i>Computer Skills</i>	<i>Classroom/Simulated Laboratory</i>
	Elect Med Records Application Skills
	Patient Services Billing Software
	PCC Tablet for Bedside Charting
	PCC Electronic Medical Records CRM
	PCC Clinical Key Perf Indicators
<i>Continuous Improvement Skills</i>	<i>Classroom/Simulated Laboratory</i>
	Providence Program Administration
	Medical Records
	Customer Service
	Communication Skills
	Problem Analysis & Problem Solving
	Clinical Services System Mgmt
	Interdepartmental Collaboration
	Interdisciplinary Team
	Incident/Accident Management
	Resident Centered Care
	Mobility Skills
	Documentation
	Continuous Quality Improv Workshop
	Culturally Appropriate Care
	Team Building
	The Five Star Rating System
	Leadership Development
<i>Business Skills</i>	<i>Classroom/Simulated Laboratory</i>
	Communication Skills
	Time Management
	HIPPA
	Transportation Procedures
	Appointment Scheduling
	Room Transfers

Attachment 2 – Training Delivery and Curriculum Listing

<i>Delivery Method</i>	<i>Productive Lab (PL)</i>
Training Type/Level	Planned Course Offerings
<i>Medical Skills (Preceptor)</i>	
	Medication Management
	Advanced Assessment Skills
	Advanced Clinical Skills
	Infection Control
	Patient Safety
	Clinical Skills Review
	Clinical Certification Skills
	Patient Assessment and Care
	Intravenous Therapy
	Enteral Management
	Intermittent
	EM Continuous
	Feeding Tube, Insert, Remove
	Feed Tube Site Care
	Dementia Care
	Respiratory Care
	Hemovac/Pnuemovac
	Dementia/Alzheimer's
	Management Patient Neurovascular Condition
	Rehabilitation Services
	Residents with Special Needs
	Gastrointestinal Conditions
	Cardiac Conditions
	Skeletal/Orthopedic Conditions
	Incontinence Mgmy (colostomy care)
	Functional Mobility and Ambulation
	Bowel and Bladder Training of Patients
	Identify Skin Impairment & Prevention
	Identify Patient Change in Condition
	Monitoring of Cardiovascular Changes
	Breathing for Respiratory Function
	Pain Management
	Position of Patient for Body Alignment
	Monitor Blood Pressure of Patients
	Operate Safety Devices w/Patient

Attachment 2 – Training Delivery and Curriculum Listing

<i>Delivery Method</i>	<i>Productive Lab (PL)</i>
Training Type/Level	Planned Course Offerings
	Activities of Daily Living
	Range of Motion Exercises w/Patient
	Patient Care of Foot and Hand
	Charting
	Colostomy Care
	Hazardous Waste Handling
	Isolation Techniques
	Safe Patient Handling
	Use of the Call Light System
	Safe Linen Handling
	Equipment/Modalities
	Therapeutic Safety
	Proper Use of Exercise Equipment
	Therapeutic Activities
	Therapeutic Exercises
	Assistive Devices
	Tempcheck for Hydrocollator/Paraffin

Attachment 3 - Training Project Characteristics Details

Provided in the table are details on the training characteristics.

Characteristic	Program Summary
Retrainee - Job Creation	<p>This program provides incentives to companies that commit to hiring new employees including a higher Reimbursement Rate:</p> <ul style="list-style-type: none">• \$20 for all delivery methods (Class/Lab; Productive Lab; E-learning) with the following exceptions –• \$22 for Clinical (Preceptor and Didactic)• \$8 for CBT (delivery Type) <p>The date of hire for trainees is within the three-month period before contract approval, or within the term of the contract. Trainees are hired into “net new jobs” as a condition of contract. Substantial Contribution and Turnover Rate penalty requirements do not apply. Employer must demonstrate expanded or new facilities, new equipment or machinery, expanded business capacity or other measureable investment in hiring workers and expanding their California workforce. A trainee whose employment is “Temp-to-Permanent”, “seasonal”, or “part-time” may be considered newly-hired, but employment retention cannot begin until trainee is a permanent full-time employee on Contractor payroll.</p>



RETRAINEE - JOB CREATION

Training Proposal for:

J.J.R. Enterprises, Inc. dba Caltronics Business Systems

Agreement Number: ET18-0112

Panel Meeting of: June 23, 2017

ETP Regional Office: Sacramento

Analyst: D. Jordan

PROJECT PROFILE

Contract Attributes:	Retrainee Job Creation Initiative HUA Veterans	Industry Sector(s):	Services Business Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Counties Served:	Alameda, Fresno, Los Angeles, Sacramento, Santa Clara, Sonoma	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 230	U.S.: 260	Worldwide: 260
<u>Turnover Rate:</u>	2%		
<u>Managers/Supervisors:</u> (% of total trainees)	6%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$304,425		\$0	\$0		\$304,425

In-Kind Contribution:	100% of Total ETP Funding Required	\$657,000
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee	Advanced Tech., Business Skills, Comm'l. Skills, Computer Skills, Mgmt. Skills, PL-Comm'l. Skills	204	8-200	0-60	\$1,125	*\$16.16
				Weighted Avg: 75			
2	Retrainee HUA	Advanced Tech., Business Skills, Comm'l. Skills, Computer Skills, Mgmt. Skills, PL-Comm'l. Skills	19	8-200	0-60	\$1,125	*\$14.18
				Weighted Avg: 75			
3	Retrainee Job Creation	Business Skills, Comm'l. Skills, Computer Skills, PL- Comm'l. Skills	14	8-200	0-60	\$2,100	*\$13.72
				Weighted Avg: 105			
4	Retrainee Job Creation HUA	Business Skills, Comm'l. Skills, Computer Skills, PL- Comm'l. Skills	6	8-200	0-60	\$2,100	*\$10.50
				Weighted Avg: 105			
5	Retrainee Veterans	Business Skills, Comm'l. Skills, Computer Skills, PL- Comm'l. Skills	7	8-200	0-60	\$1,650	*\$16.16
				Weighted Avg: 75			

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

Minimum Wage by County: Job Number 1 and 5 (Retrainee/Veterans): \$16.16 per hour for Sonoma & Placer counties; \$16.46 per hour for Sacramento County; \$16.96 per hour for Los Angeles County; and \$17.63 per hour for Alameda & Santa Clara counties.

Job Number 2 (HUA): \$12.12 per hour for Fresno County.

Job Number 3 (Job Creation): \$13.22 per hour for Sonoma & Placer counties; \$13.72 per hour for Sacramento County; \$14.13 per hour for Los Angeles; and \$14.69 per hour for Alameda & Santa Clara Counties.

Job Number 4 (Job Creation/HUA): \$10.50 per hour for Fresno County.

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

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

Up to \$2.29 per hour may be used to meet the Post-Retention Wage in Job Numbers 1 & 5; and up to \$0.97 per hour Job Number 3.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Numbers 1 & 2 (Retrainee/HUA)		
Administrative Staff	\$14.18 - \$42.46	38
Sales	\$14.18 - \$42.46	42
Solutions Engineers	\$22.26 - \$52.26	9
Supervisors	\$23.15 - \$46.88	16
Technicians	\$14.42 - \$35.54	89
Trainers	\$18.19 - \$35.13	9
Warehouse Staff	\$14.42 - \$42.69	10
Drivers	\$14.42 - \$42.69	10
Job Number 3 (Job Creation)		
Administrative Staff	\$13.72 - \$42.46	7
Sales	\$13.72 - \$42.46	4
Technicians	\$13.72 - \$35.54	3
Job Number 4 (Job Creation/HUA)		
Administrative Staff	\$10.50 - \$20.00	1
Sales	\$10.50 - \$35.54	2
Technicians	\$10.50 - \$35.54	3
Job Number 5 (Veterans)		
Administrative Staff	\$14.18 - \$42.46	3
Technicians	\$14.42 - \$42.46	2
Sales	\$14.18 - \$35.54	2

INTRODUCTION

Founded in 1976 and headquartered in Sacramento, J.J.R. Enterprises, Inc., dba Caltronics Business Systems (Caltronics) (www.caltronics.net), is a family-owned and operated business that sells, leases and services high-speed digital copiers and printers and multi-functional devices. Caltronics also sells software for document management and retrieval. Caltronics is one of the largest independent dealers of KonicaMinolta in the country, offering software solutions to increase efficiency and competition in the office products and services industry. Customers include Gilead Sciences, Western Health and Pleasanton Unified School District. Caltronics has 10 locations in California and one in Arizona. Training will take place at all California locations.

Need For Training

This is Caltronics' second ETP-funded proposal and second in the last five years. Since Caltronics is in an industry that is constantly evolving, its previous ETP Agreement focused on staying current with new technology. This proposal will continue to focus on staying current with new technology to ensure the best possible service.

The Company developed a specialized training plan for wide-format equipment. This is a new market for Caltronics and will help expand its customer base. The wide-format equipment is a change in technology from toner-based products to an ink-based product and training is pivotal for workers to learn how to operate and repair this equipment. Trainees will not receive duplicate training from Caltronics previous ETP Agreement.

Retrainee - Job Creation

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

In April 2017, Caltronics became a HP Service One vendor to expand its customer base. Also, the Company is now selling and servicing wide-format equipment has already begun hiring new employees to fill these roles.

Caltronics has committed to hiring 20 new employees (Job Numbers 3 & 4). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

PROJECT DETAILS

Training Plan

Training will be provided by in-house subject matter experts.

Advanced Technology (3%): Training will be offered to Solutions Engineers. Training will focus on technical and customized training courses that include software design and support systems and product quality/reliability. Skilled engineers will teach Advanced Technology (AT) courses.

AT will be delivered in high technical learning environments. The trainer-to-trainee ratio will not exceed 1:10 to allow for in-depth personal attention to each trainee. AT will cost more than their standard class/lab training because of the technical environment trainees in which training will be delivered.

Business Skills (15%): Training will be offered to Technicians, Warehouse Staff, Supervisors, Trainers and Sales. Training will focus on equipping Caltronics products and communication with internal and external customers.

Commercial Skills (25%): Training will be offered to all occupations. Training will improve service, quality, reliability, delivery time and order accuracy. Training topics include corrective and preventative actions, process validations and complaint management systems.

Management Skills (7%): Training will be offered to Managers and Supervisors to effectively manage personnel by improving business processes, increasing team rapport and resolving work challenges.

Computer Skills (10%): Training will be offered to all occupations. Training will increase productivity and proficiency in changing software platforms and applications.

Computer Based Training (CBT) (30%): Training will be offered to all occupations and focus on the technology that Caltronics sells and services. The majority of CBT courses are certification prerequisites to attend Konica's training and work on their equipment.

Productive Laboratory (10%)

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

PL training in Commercial Skills will be delivered by subject matter experts to Technicians and Solutions Engineers. PL training will supplement Class/Lab training to strengthen employees' understanding of how to perform equipment/operations related jobs. Technicians and Solutions Engineers face different situations each time they work on a machine at a customer's location. PL training will prepare the trainees for each different situation they will face. Training topics will include equipment operation, troubleshooting and equipment repair and maintenance. PL training is capped at 40 hours with a 1:1 trainee-to-trainer ratio.

Trainers will provide a demonstration on the machine before observing the trainee. Trainees will be monitored while performing tasks on specific machines until they are determined to be competent at that specific operation. During PL, training trainees are not held to productivity standards since the objective is to learn and be competent on what they are being taught. PL training will be determined by the requirements for each machine and the needs for certain trainees.

Veterans Program

The Panel has established a higher reimbursement rate and other incentives for training California veterans. Higher support costs are also available to reach participants for this program. The Panel has established a higher reimbursement rate and other incentives for training California veterans, as will be reflected in the contract. Caltronics has committed to hiring seven veterans (Job Number 5).

High Unemployment Area

Twenty-five trainees (Job Numbers 1 & 2) work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%. The Company's locations in Fresno and San Joaquin counties qualify for HUA status under these standards. The Panel may modify the ETP Minimum Wage for these trainees by up to 25% if post-retention wages exceed the start-of-training wages. Caltronics is requesting a wage modification for 19 trainees in Job Number 2 from \$16.16 to \$14.18 and 6 trainees in Job Number 4 from \$13.22 to \$10.50.

Commitment to Training

Caltronics currently has an annual training budget of \$100,000 for all locations. Training includes, business skills, customer service, sales, industry-specific internal software and manufacturing specific technical training. ETP funds will not displace the existing financial commitment to training.

➤ **Training Infrastructure**

Caltronics has a number of staff dedicated and executive staff on-site at each location that will be responsible for scheduling training, collecting completed rosters and sending them to the corporate office. Integrated Solutions will be responsible for trainee's enrollment, uploading of training hours and other administrative duties.

Impact/Outcome

Caltronics goal is to keep trainees up-to-date with the new technology that Konica releases in 6-month intervals. Training will allow workers to properly diagnose and correct issues with hardware, software and effectively communicate with customers. The Company is also continually looking to purchase other companies within the industry and are actively pursuing large public bids, which require them to hire additional trainees.

Substantial Contribution

Caltronics is a repeat contractor where payment earned did not exceed \$250,000 at a single facility within the past five years. Therefore, Substantial Contribution does not apply.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0411	Multiple	04/06/15 – 04/05/17	\$303,530	*\$30,000 (0%)

*Based on ETP Systems, 21,321 reimbursable hours have been tracked for potential earnings of \$303,530 (100% of approved amount). Caltronics expects all trainees to meet the retention and post-retention wage requirements.

DEVELOPMENT SERVICES

Integrated Solutions in Redwood City assisted with development for a flat fee of \$6,000.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined

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

8-200 Trainees may receive any of the following:

BUSINESS SKILLS

- Accounting
- ADP Payroll
- Inventory Control
- New Product Knowledge
- Business Report Writing
- Conflict Management
- Interpersonal Skills
- Customer Relations
- Identifying Customer Needs
- Handling Customer Requests
- Resolving Customer Complaints
- Leadership Skills
- Decision Making

COMMERCIAL SKILLS

- New Technology
- Equipment Repair and Maintenance
- Equipment Upgrade
- Equipment Set-Up
- Process Improvement
- Troubleshooting

COMPUTER SKILLS

- Microsoft Office Intermediate & Advanced
- Computer Networking
- Network Management
- Decision Making

MANAGEMENT SKILLS (Supervisors/Managers Only)

- Leadership
- Decision Making
- Teambuilding

Advanced Technology (Ratio 1:10)

0-80

COMMERCIAL SKILLS

- Network Engineering & Connections
- Programming
- Computer Operated Equipment
- Solutions Engineering
- Troubleshooting

Productive Lab (Ratio 1:1)

0-40

COMMERCIAL SKILLS

- Equipment Operation
- Troubleshooting & Problem Identification
- Software Programming
- Optical Character Recognition
- Equipment Repair and Maintenance

CBT Hours

0-60

COMMERCIAL SKILLS

- Association Certification (28 hours)
- Professional Certification (14 hours)
- Expert Color Certification (11 hours)
- Expert Production Print Certification (11 hours)
- Expert Network Certification (19 hours)
- Expert Office Solutions Certification (15 hours)
- Master Color Certification (8 hours)
- Master Production Print Certification (8 hours)
- Master Office Solutions Certification (8 hours)
- Information Technology Infrastructure Library (25 hours)
- Machine/Software Specific Technical Certification (24 hours)
- Harvard Managed Mentor Training (16 hours)

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. CBT is capped at 50% of total training hours, per trainee. PL is capped at 40 hours per trainee.



TRAINING PROPOSAL FOR
Johns Manville
17- 0644

Panel Meeting Date: 06/23/2017
Regional Office: Sacramento Regional Office
Analyst Name: Mam, Karen
Type of Proposal: Single Employer Contract (SE)
Funding Source: Out-of-State Competition (OSC)

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$429,044.00			
Program & Admin Cost	Support Cost	Substantial Contribution (\$ / %)	Total In-Kind
\$429,044.00	N/A	N/A	\$625,000.00

APPLICANT PROFILE

<i>Company Summary</i>	Headquartered in Willows, Johns Manville (JM) is a wholly-owned subsidiary of Berkshire Hathaway, Inc. that manufactures residential and commercial insulation, commercial roofing, mechanical insulation and materials for other manufacturers' products and applications.
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<i>Industry Sector(s)</i>	Manufacturing
<i>Priority Industry</i>	Yes
<i>No. of Employees (Applicant)</i>	State: <u>376</u> US: <u>4,350</u> World Wide: <u>7,623</u>
<i>Turnover Rate (Applicant)</i>	8.90%
<i>Repeat Contractor</i>	Yes
<i>High Unemployment Area</i>	Yes
<i>Unions</i>	N/A

TRAINING PROFILE

<i>Training Objective</i>	Training will increase production while upgrading employee's skill on new and existing modules.
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Training is summarized below. Additional details are provided in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# of Trainees	Reimbursement Rate	Avg. Hours	Cost Per Trainee	Min – Max Hour
1	Retrainees	313	\$18.00	66	\$1,188.00	8-200
2	Retrainees, Job Creation	22	\$20.00	130	\$2,600.00	8-200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details on the proposed Training Project.

1. Company Background

Founded in 1858, JM manufactures premium-quality building and mechanical insulation, commercial roofing, glass fibers and non-woven materials. Its customer base includes commercial, industrial and residential applications as distributed throughout the United States, South Korea, Australia and Canada. JM products are used in a variety of industries including building, aerospace, automotive and transportation, filtration, commercial interiors, waterproofing and wind energy. Training under this proposal will be delivered at the Company's Willows location by in-house experts.

2. Current Training Project Details

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

<i>Purpose of Training</i>	<p>This is JM's second Agreement in the last five years. In the previous Agreement, the Company focused training efforts on new production lines being installed. Training under this proposal will focus on training staff on updated designs and robotics being added to existing equipment. The Company has recently invested over \$1,000,000 this year on upgrading its packing equipment and robotics.</p> <p>Training will also focus on Continuous Improvement in Lean manufacturing to improve production processes and efficiencies. The Company will provide staff with transferrable skills.</p> <p>JM is expanding its workforce and adding new production lines to keep up with increased sales volume. The Company has committed to hire 22 new Operators. 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 the contract.</p>
<i>Training Infrastructure and Administrative Plan</i>	<p>The same in-house Training Coordinator who administered the previous Agreement will be dedicated to this one. The Coordinator will schedule training, maintain rosters, provide trainee enrollment data, verify training and retention completion, participate in ETP monitoring activities.</p>
<i>Marketing Plan</i> (MEC Only)	N/A
<i>Support Cost Description</i> (MEC Only)	N/A
<i>Substantial Contribution Description</i>	<p>JM is a repeat contractor where payment earned did not exceed \$250,000 at a single facility within the past five years. Therefore, Substantial Contribution does not apply.</p>

3. Sample Curriculum

Provided below is a summary of the methods by which training will be delivered including a sample of the courses that will be offered.

Each of the Trainee groups will be able to take courses under the various delivery methods.

Delivery Method	Classroom/Simulated Laboratory
Training Type/Level	Sample Classes
Commercial Skills	Air Compressor
	Arc Flash
Continuous Improvement Skills	Advanced Lean
	Six Sigma Green Belt
Manufacturing Skills	Glass Production
	Production Skills
Business Skills	Communication Skills
	Leading A Team
Computer Skills	Microsoft Office (Intermediate/Advanced)
	Programmable Logic Controllers

Delivery Method	Productive Lab (PL)
Training Type/Level	Sample Classes
Manufacturing Skills	Glass Making
	HEBB – Robotics
Justification Summary: In accordance with ETP PL guidelines, 190 Operators, Batch & Binder Tenders, Packaging Team Leaders, Machine Chiefs and Maintenance Staff will receive up to 60 hours of PL training. JM is adding new modules that will require “hands-on” training for proper operation. PL training will allow practical, real-world experience in a working environment without creating an excess of waste.	

4. Additional Company or Training Project Details

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

4.1 Program Waivers

The next table lists the various waivers and supporting justifications for training that apply to this proposed Training Project.

Waivers/Justification Type	Summary
None have been requested	

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost
Development	None Identified		
Administrative	None Identified		
Training	None Identified		

4.3 Previous ETP Project Summary

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

Past Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance %
<i>ET13-0360</i>	Willows	04/29/13 – 04/28/15	\$501,876	\$464,307.00	93%

4.4 Supporting Panel Proposal Documentation

Provided in Attachments 1, 2 and 3 is additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 1 – Group and Job Title Details

The proposed Training Project includes training for the following Trainees, organized by training group.

Group #: 1 – Retrainees	
County	ETP Minimum Wage
Glenn	\$16.16

Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post-Retention Wage
Glenn County				
Batch & Binder Tender	9	\$22.90 - \$22.90	\$0.00	\$22.90
Blow Wool Tender	4	\$21.85 - \$21.85	\$0.00	\$21.85
Coordinator	5	\$22.50 - \$35.00	\$0.00	\$22.50
Engineer	3	\$32.50 - \$45.00	\$0.00	\$32.50
Forming Equipment Mechanic	1	\$25.07 - \$25.07	\$0.00	\$25.07
Machine Chief	13	\$27.43 - \$27.43	\$0.00	\$27.43
Maintenance Staff	50	\$26.15 - \$31.90	\$0.00	\$26.15
Operator	153	\$17.24 - \$24.36	\$0.00	\$17.24
Packaging Team Leader	12	\$23.35 - \$23.35	\$0.00	\$23.35
Production Staff	12	\$22.04 - \$29.79	\$0.00	\$22.04
Receiving Clerk	5	\$21.85 - \$24.64	\$0.00	\$21.85
Specialist	3	\$32.50 - \$45.00	\$0.00	\$32.50
Supervisor – Production	5	\$30.00 - \$45.00	\$0.00	\$30.00
Technician	5	\$26.50 - \$29.58	\$0.00	\$26.50
Technologist	1	\$45.00 - \$45.00	\$0.00	\$29.58
Warehousing Staff	32	\$21.64 - \$26.27	\$0.00	\$22.13

Attachment 1 – Group and Job Title Details

Group #: 2 Retraitees, Job Creation	
County	ETP Minimum Wage
<i>Glenn County</i>	\$13.22

Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post-Retention Wage
Operator	22	\$17.24 - \$21.39	\$0.00	\$17.24

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method</i>	<i>Classroom/Simulated Laboratory</i>
Training Type/Level	Planned Course Offerings
<i>Commercial Skills</i>	
	Air Compressor
	Arc Flash 70
	Heating, Ventilation and Air Conditioning
	Predictive Maintenance
	Programmable Logic Controller
	Pumps
<i>Continuous Improvement</i>	
	Advanced Lean
	Introduction to Lean
	Leadership
	Process Improvement
	Six Sigma Green Belt
<i>Manufacturing Skills</i>	
	Glass Production
	Fork Lift Training
	High Efficiency Batt Bagger
	OSHA 10
	OSHA 30
	Production Skills
<i>Business Skills</i>	
	Communication Skills
	Leading A Team
<i>Computer Skills</i>	
	Microsoft Office (Intermediate/Advanced)
	Programmable Logic Controllers

<i>Delivery Method</i>	<i>Productive Lab (PL)</i>
Training Type/Level	Sample Classes
<i>Manufacturing Skills</i>	
	Facing Operator
	Glass Making
	HEBB – Robotics
	Packaging Skills

Attachment 2 - Training Delivery and Curriculum Listing

<i>PL Justification</i>	
Need for Productive Laboratory Training	JM has experience a growth in sales and needs to increase production. As they increase production, modules must be added and employees will need to be trained to operate those modules. The Company has also upgraded the design of its HEBB packaging machine and added robotics. This new added feature will require extensive training. The Company will train Operators, Batch & Binder Tenders, Packaging Team Leaders, Machine Chiefs and Maintenance Staff. JM is requesting the trainer-to-trainee ratio of 1:3. Equipment requires 2-3 staff members operating equipment at any given time.
Equipment/Processes to be Used	Equipment to be used during PL includes HEBB, Glass Maker, Fiberization Machine, Curing & Sizing Machine, and Packaging Equipment.
Trainer Qualifications	All trainers are subject-matter experts who will sign off on all associated documents for the production process. The trainers will demonstrate proper use of equipment, monitor the trainee using the equipment, and offer coaching to ensure trainee will meet production requirements.

Attachment 3 - Training Project Characteristics Details

Provided in the table are details on the training characteristics.

Characteristic	Program Summary
Retrainee - Job Creation	The Panel incentivizes job creation. Training for newly-hired employees is reimbursed at a higher rate, and trainees are subject to a lower post-retention wage. The date-of-hire for trainees is within the three-month period before contract approval, or within the term of the contract. Trainees are hired into “net new jobs” as a condition of contract. Substantial Contribution and Turnover Rate penalty requirements do not apply. Employer must demonstrate expanded or new facilities, new equipment or machinery, expanded business capacity or other measureable investment in hiring workers and expanding its California workforce.



TRAINING PROPOSAL FOR
Manor Care of Citrus Heights CA, LLC dba ManorCare Health Services
17- 0710

Panel Meeting Date: 06/23/2017
Regional Office: Sacramento Regional Office
Analyst Name: Smiley, Karen
Type of Proposal: Single Employer Contract (SE)
Funding Source: Special Employment Training (SET)

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$599,544.00			
Program & Admin Cost	Support Cost	Substantial Contribution (\$ / %)	Total In-Kind
\$599,544.00	N/A	N/A	\$790,000.00

APPLICANT PROFILE

<i>Company Summary</i>	Manor Care of Citrus Heights CA, LLC (Manor Care) is a subsidiary of HCR Manorcare Medical Services of Florida, LLC (HCR). HCR was founded in 2004 and has its headquarters located in Ohio. Manor Care was also opened in 2004 and provides senior care and rehabilitation services to patients recently discharged from acute care hospitals.
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<i>Industry Sector(s)</i>	Healthcare
<i>Priority Industry</i>	Yes
<i>No. of Employees (Applicant)</i>	State: <u>1,200</u> US: <u>51,000</u> World Wide: <u>51,000</u>
<i>Turnover Rate (Applicant)</i>	5.80%.
<i>Repeat Contractor</i>	No
<i>High Unemployment Area</i>	Yes
<i>Unions</i>	No

TRAINING PROFILE

<i>Training Objective</i>	Manor Care will train their nursing and therapeutic workforce in Skilled Nursing, Clinical Care, Post-surgical Care and Intravenous Therapy skills. This training will improve clinical skills and patient satisfaction. Training will be offered using the Class/Lab, Preceptor and Computer Based Training delivery methods.
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Training is summarized below. Additional details are provided in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# of Trainees	Reimbursement Rate	Avg. Hours	Cost Per Trainee	Min – Max Hour
1	Retrainees	757	\$18.00	44	\$792	8-200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details on the proposed Training Project.

1. Company Background

Manor Care provides senior care and rehabilitation services to patients recently discharged from acute care hospitals. Manor Care services include skilled nursing, rehabilitation services and clinical care for patients.

This will be Manor Care's first ETP Agreement. There will be seven HCR-owned facilities in California participating in this proposal with Manor Care of Citrus Heights CA, LLC as the lead facility and contract holder. The six other facilities participating in this proposal are as follows:

- Manor Care of Fountain Valley CA, LLC dba ManorCare Health Services in Fountain Valley
- Manor Care of Hemet CA, LLC dba ManorCare Health Services in Hemet
- Manor Care of Palm Desert CA, LLC dba ManorCare Health Services in Palm Desert
- Manor Care of Sunnyvale CA, LLC dba ManorCare Health Services in Sunnyvale
- Manor Care of Walnut Creek CA, LLC dba ManorCare Health Services in Walnut Creek
- Manor Care-Tice Valley CA, LLC dba ManorCare Health Services in Walnut Creek

2. Current Training Project Details

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

<i>Purpose of Training</i>	<p>Medical Skills clinical training will be delivered to the 757 trainees in Group 1 using both the Didactic and Preceptor method of delivery. The instructor-preceptor will first demonstrate a clinical skill and then monitor trainees as they perform in a hands-on environment. This training will be reinforced with classroom coursework. The Panel has established a higher reimbursement rate of \$22 per hour for nurse upgrade training, recognizing the higher cost of delivery for the Clinical Preceptor and Didactic models.</p> <p>Within the last year, Manor Care has seen an influx of patients with higher levels of acuity. To manage this, Manor Care must provide training on advanced disease management. Training will improve clinical outcomes and ensure staff can meet the changing needs of patients. Medical Skills training will also focus on preventing readmittance of patients into acute care hospitals.</p> <p>Illnesses such as general weakness, chronic pain, arthritis, Parkinson's, Alzheimer's and other forms of dementia put patients at a greater risk of injury. Manor Care's training initiative will increase staff's understanding of these illnesses. Training will focus on skills that increase patient safety and increase patient quality of life.</p> <p>Additionally, Manor Care needs to improve internal processes. Computer training will be provided so staff can effectively use internal software programs, such as Electronic Medical Records (EMR) system used to track patient treatment plans and health history. Continuous Improvement training will increase staff leadership and communication skills.</p>
<i>Training Infrastructure and Administrative Plan</i>	<p>The Company's current training budget is approximately \$75,000 per facility. Training programs include new hire orientation, sexual harassment prevention, safety training, annual computer skills training, skills updates and in-service 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</p>

	<p>federal law.</p> <p>As the Contractor, Manor Care will coordinate training, collect ETP documents and communicate with the point-person for each affiliate location. Manor Care has dedicated in-home staff to all aspects of this project, also covering the seven affiliates. Each participating location (affiliate) will also have a training coordinator to report training performance to this administrator. Manor Care has also contracted with National Training Systems Inc. to assist with project administration.</p>
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Sample Curriculum

Provided below is a summary of the methods by which training will be delivered including a sample of the courses that will be offered.

Each of the Trainee groups will be able to take courses under the various delivery methods.

Delivery Method	Classroom/Simulated Laboratory
Training Type/Level	Sample Classes
Medical Skills (Didactic)	Patient Transfer Techniques
	Restorative Nursing Program
Computer Skills	SharePoint for Site Owners: Managing Lists
	Electronic Medical Records Application Skills
Continuous Improvement	Surveillance and Analysis
	What is Dementia?
Delivery Method	Medical Skills Preceptor
Training Type/Level	
Medical Skills	Intravenous Therapy
	Tube-Fed Individuals with Diabetes Mellitus
Delivery Method	Computer Based Training
Training Type/Level	
Computer Skills	Rehab Claims/ Data collection Patients/ Medicare
	Rehab PT Multi-Level Codes
	Excel 2010 Intermediate Skills

4. Additional Company or Training Project Details – Keep all subparagraphs

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

4.1 Program Waivers

The next table lists the various waivers and supporting justifications for training that apply to this proposed Training Project.

Waivers/Justification Type	Summary
Special Employment Training (SET)	<p>Under Special Employment Training (SET), employers are not required to demonstrate out-of-state competition. Trainees must be earning at least the statewide average hourly wage at the end of the retention period.</p> <p>Wage Modification</p> <p>The 757 trainees in Group 1 are employed in a Priority Industry and qualify for a wage modification up to 25% below the Statewide Average Hourly Wage. The wage modification, from \$29.38 per hour to \$22.04 per hour, is requested for 326 trainees in Job Group 1.</p>
High Unemployment Area (HUA)	<p>193 trainees in Group 1 work in regions with unemployment exceeding the state average by at least 25%. Trainees qualify for the Standard Wage rather than the SET Statewide Average Hourly Wage. Additionally, the Standard Wage may be modified by up to 25% if the post-retention wage reflects an increase from wages earned at the start-of-training.</p> <p>Manor Care is requesting a 25% wage modification from the ETP Standard Minimum Wage to the HUA Minimum Wage (from \$16.16 per hour to \$12.12 per hour) for the 107 CNA trainees in Riverside County. The other 86 trainees make at least the ETP Standard Minimum Wage.</p>
Retention Modification for Allied Healthcare	<p>Healthcare workers are considered non-customary workers. For this, they are allowed to modify the definition of full-time employment from 35 hour in a 90-day period to 30 hours in a 90 day period. Additionally, these workers may use an alternate retention (500 hours within 272 days with one employer) to satisfy the retention requirement.</p>

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost
Development	National Training Systems Inc.	Ladera Ranch	\$ 27,939.00
Administrative	National Training Systems Inc.	Ladera Ranch	10% of earned funds
Training	To Be Determined		

4.3 Previous ETP Project Summary

The applicant has no previous ETP contracts.

4.4 Supporting Panel Proposal Documentation

See Attachments 1, 2 and 3 for additional details on the intended training population, the curriculum, and program characteristics.

Attachment 1 – Group and Job Title Details

The proposed Training Project includes the following Trainees, organized by group.

Group #: 1 – Retrainees	
County	ETP Minimum Wage
SET-Sacramento	\$22.04/\$29.38
SET-Orange	\$22.04
SET-Riverside (HUA Wage-Standard Wage)	\$12.12/\$16.16
SET-Riverside	\$22.04/\$29.38
SET-Contra Costa	\$22.04/\$29.38
SET-Santa Clara (Tice Valley Location)	\$22.04/\$29.38
SET-Santa Clara (Rossmoor Location)	\$22.04/\$29.38

Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post Retention Wage
Sacramento County				
Registered Nurse	57	\$29.38 - \$58.67	N/A	\$29.38
Licensed Vocational Nurse	20	\$22.04 – 29.37	N/A	\$22.04
Therapy Staff	28	\$27.00 - \$56.00	N/A	\$27.00
Orange County				
Registered Nurse	19	\$28.00 - \$57.00	N/A	\$28.00
Licensed Vocational Nurse	36	\$22.04 - \$36.00	N/A	\$22.04
Therapy Staff	18	\$36.00 - \$56.00	N/A	\$36.00
Riverside County (Hemet Location) – SET (Standard/HUA Wage)				
Registered Nurse	37	\$29.00 - \$57.00	N/A	\$29.00
Licensed Vocational Nurse	16	\$19.79 - \$39.00	N/A	\$19.79
Therapy Staff	33	\$35.00 - \$64.00	N/A	\$35.00
Certified Nursing Assistant	107	\$12.12 - \$15.50	N/A	\$12.12
Riverside County (Palm Desert Location) – SET				
Registered Nurse	17	\$29.00 - \$57.00	N/A	\$29.00

Attachment 1 – Group and Job Title Details

Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post Retention Wage
Licensed Vocational Nurse	71	\$22.04 - \$35.00	N/A	\$22.04
Therapy Staff	26	\$36.00 - \$64.00	N/A	\$36.00
Contra Costa County				
Registered Nurse	18	\$29.00 - \$55.00	N/A	\$29.00
Licensed Vocational Nurse	12	\$22.04 - \$39.00	N/A	\$22.04
Therapy Staff	13	\$34.00 - \$62.00	N/A	\$34.00
Santa Clara County (Tice Valley Location)				
Registered Nurse	39	\$30.00 - \$59.00	N/A	\$30.00
Licensed Vocational Nurse	28	\$22.04 - \$42.00	N/A	\$22.04
Therapy Staff	15	\$27.00 - \$55.00	N/A	\$27.00
Santa Clara County (Rossmoor Location)				
Registered Nurse	66	\$34.50 - \$64.00	N/A	\$34.50
Licensed Vocational Nurse	44	\$22.04 - \$42.00	N/A	\$22.04
Therapy Staff	37	\$30.50 - \$59.00	N/A	\$30.50

Attachment 2 – Training Delivery and Curriculum Listing

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

Delivery Method	Classroom/Simulated Laboratory
Training Type/Level	Medical Skills
<i>Didactic</i>	Course Offerings
	Advanced Cardiac Life Support
	Advanced Disease Management
	Annual Skills Update
	Arterial Blood Gas Interpretation
	Basic Life Support
	Behavior Management
	Blood Borne Pathogens
	Body Mechanics
	Cardiac Conditions
	Change of Condition Management
	Circle of Care
	Clinical Models and Practices
	Death and Dying
	Dementia/Alzheimer's
	Diabetic Management
	Electrolyte Imbalance
	End of Life Care
	Enteral Feeding Tube Management
	Equipment Skills
	Gastrointestinal System
	Incontinence Management
	Infection Control
	Influenza
	Interdisciplinary Team Process
	Intravenous Therapy
	Laboratory
	Lifting and Transfers
	Medication Administration Management
	Needle Stick Prevention
	Neurological Conditions
	Neurovascular System
	Nursing Life Vest Training
	Nursing Program
	Pain Management (Acute and Chronic)
	Patient Assessment & Care
	Patient Fall Prevention

Attachment 2 – Training Delivery and Curriculum Listing

Delivery Method	Classroom/Simulated Laboratory
Training Type/Level	Medical Skills
<i>Didactic</i>	Course Offerings
	Patient Transfer Techniques
	Physical, Occupational, Speech Therapy
	Professional Assault Crisis Training and Cert
	Psychotropic Medication Management
	Resident and Family Education
	Resident Emergency Response
	Residents with Special Needs
	Respiratory Care
	Respiratory Management
	Restraint and Restraint Reduction
	Skeletal/Orthopedic Conditions
	Skin Care
	TB Risk Assessment
	Urinary Management (Foley Catheter, Input/Output)
	Wound Management

Delivery Method	Classroom/Simulated Laboratory
Training Type/Level	Classroom
<i>Computer Skills</i>	Course Offerings
	Electronic Medical Records Application Skills
	Electronic Tablet for Bedside Charting
	Patient Services Billing Software
	Rehab Optima for iPad
	Rehab Synchrony

Delivery Method	Classroom/Simulated Laboratory
Training Type/Level	Classroom
<i>Continuous Improvement Skills</i>	Course Offerings
	Clinical Administration Processes
	Admissions Process
	Clinical Services System Management
	Communication Skills
	Compliance
	Customer Service
	Documentation
	Techniques for Developing Staff

Attachment 2 – Training Delivery and Curriculum Listing

Delivery Method	Classroom/Simulated Laboratory
Training Type/Level	Classroom
<i>Continuous Improvement Skills</i>	Course Offerings
	Incident/Accident Management
	Interdepartmental Collaboration
	Leadership
	Medical Records
	Mobility Skills
	Problem Analysis and Problem Solving
	Quality Assurance
	Quality Improvement
	Resident Centered Care
	Standard Operating Procedures/ New Procedures
	Survey Plan of Correction
	Team Building

Delivery Method	Productive Laboratory
Training Type/Level	Medical Skills
<i>Preceptor</i>	Planned Course Offerings
	Activities of Daily Living
	Admissions Process
	Advance Disease Management
	Assistive Devices
	Blood-Borne Pathogens
	Bolus
	Bowel and Bladder Training of Patients
	Breathing Patterns and Respiratory Function
	Cardiac Conditions
	Charting
	Clinical Models and Practices
	Clinical Skills Review
	Colostomy Care
	Conduct Range of Motion Exercises with Patient
	Continuous
	Death and Dying
	Dementia Care

Attachment 2 – Training Delivery and Curriculum Listing

Delivery Method	Productive Laboratory
Training Type/Level	Medical Skills
<i>Preceptor</i>	Planned Course Offerings
	Dementia/Alzheimer's
	Enteral Management
	Equipment/Modalities
	Feeding Tube
	Functional Mobility and Ambulation
	Gastrointestinal Conditions
	Hazardous Waste Handling
	Identification of Patient Change in Condition
	Identification of Skin Impairments and Prevention
	Incontinence Management (Colostomy Care)
	Infection Control
	Inpatient & Outpatient Care Unit
	Insertion
	Intermittent
	Intravenous Therapy
	Isolation Techniques
	Managing Patients with Neurovascular Conditions
	Medication Management
	Monitor Blood Pressure of Patients
	Monitoring of Cardiovascular Changes
	Occupational Therapy
	Operate Safety Devices with Patient
	Pain Management
	Patient Assessment and Care
	Patient Care of Foot and Hand
	Patient Safety
	Performing Self-Care Skills with Patients
	Physical Therapy
	Positioning Patients for Correct Body Alignment
	Preventing Complications Related to Tube Feedings
	Preventing Needle Stick
	Proper Use of Exercise Equipment
	Rehabilitation Services

Attachment 2 – Training Delivery and Curriculum Listing

Delivery Method	Productive Laboratory
Training Type/Level	Medical Skills
<i>Preceptor</i>	Planned Course Offerings
	Removal
	Residents with Special Needs
	Respiratory Care
	Safe Linen Handling
	Safe Patient Handling
	Site Care
	Skeletal/Orthopedic Conditions
	Skin Care
	Speech Therapy
	Temperature Check for Hydro Collator/Paraffin
	Therapeutic Activities
	Therapeutic Exercises
	Therapeutic Safety
	Tube-Fed Individuals with Diabetes Mellitus
	Use of the Call Light System
	Wound Management

Delivery Method	Computer Based Training (CBT)	
Training Type/Level	CBT	
<i>Computer Skills</i>	Course Offerings	hours per CBT course
	abagis Corp Repots.	0.5
	abagis Quality Mgmt.	0.75
	abagis Stage 1 Resident Interviews	0.5
	abagis Stage 2 and QAPI Reports	0.75
	abagis Stage 2 Overview	1.25
	abagis Stage 2 Overview of abagis QAPI Features	0.75
	Excel 2010 Intermediate Skills	1
	Learning to Use eVendor	0.5
	Outlook 2010 Intermediate Skills	1
	PowerPoint 2010 Intermediate	1
	Progress Notes Tutorial	1
	Rehab 2017 Recording Services in Optima	0.5
	Rehab Claims/ Data Collection Patients/	0.75

Attachment 2 – Training Delivery and Curriculum Listing

Delivery Method	Computer Based Training (CBT)	
Training Type/Level	CBT	
Computer Skills	Course Offerings	hours per CBT course
	Medicare	
	Rehab Doc Principles and Guidelines	0.5
	Rehab OT Multi-Level Codes	0.5
	Rehab PT Multi-Level Codes	0.5
	Rehab Services: Clinical	1
	Rehab Services: Optima 2016	1
	Rehab Services: Set-up Training for Rehab Aides	0.5
	Rehab Services: So Your Patient Can't Follow D.?	1
	Rehab: Automated Outcomes System & FIM Refresher	1
	Rehab: Claims Based Data for Patients	0.75
	Rehabilitation Services: CPT Coding and CCI Edits	0.5
	Validating/Signing Section GG on the MDS Webinar	0.5
	VitalStim - HCR Guidelines	0.5
	Word 2010 Intermediate Skills	2

Delivery Method	Computer Based Training (CBT)	
Training Type/Level	CBT	
Continuous Improvement	Course Offerings	hours per CBT course
	Allen Cognitive Disabilities Model	1
	Annual Mandatory: 2017 Blood-Borne Pathogens	1
	Annual Mandatory: 2017 Infection Control	0.75
	Annual Mandatory: Caring for the Cognitively Imp.	1
	Behavior Practice Guide	1
	Braden Scale	1
	Caring for the Cognitively Impaired	1
	Clinicians	1.5
	Clostridium Difficile	0.5
	CMS-672 and CMS-802 Reports	1

Attachment 2 – Training Delivery and Curriculum Listing

Delivery Method	Computer Based Training (CBT)	
Training Type/Level	CBT	
<i>Continuous Improvement</i>	Course Offerings	hours per CBT course
	CNA Documentation in POC	1
	Communicating with Older Adults Dementia	1
	Components of a Neurologic Assessment	1
	Components of Musculoskeletal Asses	0.75
	COPD	1.25
	Creating a Care Plan	0.5
	Creating Care Plans from Assessments & MDSs	0.5
	Dementia Care	1
	Dementia Practice Guide	1
	Dementia Practice Guide for Arcadia Units	0.75
	Dietary Service Ware	0.5
	Dysphagia Rehab: Other sEMG Considerations	1
	Dysphagia Rehab: sEMG Exercise	1
	Dysphagia Rehabilitation: sEMG Assessment	1
	Embrace the Menu	0.75
	EOE: Dietary Orders	0.5
	EOE: IV and Parenteral Orders	0.75
	EOE: Lab, Diagnostic, and Other Order Categories	0.75
	EOE: Medication and Treatment Administration	1
	EOE: Other Actions (Modifying Existing Orders)	0.5
	Fever: Nursing Management	1
	Fluid and Electrolyte Imbalances	1
	Heart Failure Management	2
	Incident Management	0.5
	Jeopardy Infection Control: Licensed Nurses	1
	Legal Issues/ Care Options for Dementia Patients	2

Attachment 2 – Training Delivery and Curriculum Listing

Delivery Method	Computer Based Training (CBT)	
Training Type/Level	CBT	
<i>Continuous Improvement</i>	Course Offerings	hours per CBT course
	Medication Management	1
	Myocardial Infarction	1
	Nursing Leadership / Staffing	0.75
	Nursing Leadership Introduction	1
	Nursing Leadership Staffing and Scheduling	0.5
	Nursing Leadership Survey Trainer Module 2	0.5
	Nursing Leadership/ Clinical Systems	0.5
	Nursing Leadership/Nursing Education	1
	Nursing Leadership/Quality Processes	0.75
	Nursing Leadership: Fiscal Management	1
	Nursing Leadership: Patient Management	0.75
	Nursing Leadership: Survey Trainer Module 3	0.5
	Outbreak Investigations	0.5
	Outpatient Care	1
	PCC: Immunization Tracking	1
	Personal Protective Equipment (PPE)	0.5
	Physical Agent Modality - Ultrasound	2
	Physical Agent Modality Basics Electrotherapy	1
	Physical Agent Modality Short Wave Diathermy	2
	PleurX System Patient Education DVD	0.5
	Pneumonia and Bronchitis Management	1
	POC Task Management	1
	Preventing Urinary Tract Infections	0.5
	Rehab 2017 Billable Guidelines	0.5
	Rehab 2017 Billable Guidelines for Modalities	1
	Rehab Claims for Patients with Med B	0.75
	Rehab Medicare/Managed Care Part B Forms	1
	Rehab Services: 2016 Evaluations	0.5

Attachment 2 – Training Delivery and Curriculum Listing

Delivery Method	Computer Based Training (CBT)	
Training Type/Level	CBT	
<i>Continuous Improvement</i>	Course Offerings	hours per CBT course
	Rehab Services: 2016 Progress Notes	0.5
	Rehab Services: 2017 ACP Contraindications	0.5
	Rehab Services: 2017 ACP Electrode Safety	0.75
	Rehab Services: Claims Medicare Part B for SLP	1
	Rehab/Measuring BP for the 21st Century	1.5
	Rehab: 2017 CPT Coding Update for PT Outpatient	1
	Rehab: Co-Treatment A Collaborative Approach	0.75
	Respiratory Therapy and the MDS	2
	Restorative Nursing CNA # 1	0.5
	Restorative Nursing for CAN Module 3	0.75
	Restorative Nursing for CNA 4	0.5
	Restorative Nursing Process # 1	0.5
	sEMG and Dysphagia Rehabilitation	1
	Sepsis Management	1
	Surveillance and Analysis	0.75
	Surveillance and HAIs	1
	Survey Process Guidelines	1
	Sysco IMPAC In-service	0.5
	Tabletop Setting	0.5
	TB Risk Assessment 2016-2017	0.5
	The Role of CNA in Infection Control	0.75
	Tuberculosis	0.5
	Using Quick ADT (QADT)	0.5
	Weekly Pressure Ulcer Note	0.5
	What is Dementia?	1
	When is an Infection Really an Infection?	0.5
	Wound Care Dressing Change Video	1

Attachment 3 - Training Project Characteristics Details

Provided in the table are details on the training characteristics.

Characteristic	Program Summary
Computer Based Training (CBT)	CBT will be provided to supplement the Company's main training curriculum. For certain courses, CBT is a more efficient and effective means of training. The delivery Method CBT is reimbursed at \$8 per hour. CBT hours are capped at 50% of total training hours per-trainee.



TRAINING PROPOSAL FOR
Villara Corporation
17-0616

Panel Meeting Date: 06/23/2017
Regional Office: Sacramento Regional Office
Analyst Name: Lazarewicz, Jana
Type of Proposal: Single Employer Contract (SE)
Funding Source: Out-of-State Competition (OSC)

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$343,500.00			
Program & Admin Cost	Support Cost	Substantial Contribution (\$ / %)	Total In-Kind
\$343,500.00	N/A	N/A	\$343,500.00

APPLICANT PROFILE

<i>Company Summary</i>	Headquartered in Sacramento, Villara Corporation (Villara) is an HVAC contracting and sheet metal fabricating company. The Company provides renovation and new construction services for residential and commercial customers that include plumbing, solar, electrical, and fire protection.
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<i>Industry Sector(s)</i>	Construction, Manufacturing
<i>Priority Industry</i>	Yes
<i>No. of Employees (Applicant)</i>	State: <u>800</u> US: <u>800</u> World Wide: <u>800</u>
<i>Turnover Rate (Applicant)</i>	12%.
<i>Repeat Contractor</i>	Yes
<i>High Unemployment Area</i>	Yes
<i>Unions</i>	N/A

TRAINING PROFILE

<i>Training Objective</i>	Villara has invested in new equipment and software upgrades and needs to train staff in processes to increase productivity, capacity, and technical expertise. Additionally, the Company will cross-train employees to ensure they are fully versatile to work on different equipment.
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Training is summarized below. Additional details are provided in *Attachment A - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# of Trainees	Reimbursement Rate	Avg. Hours	Cost Per Trainee	Min – Max Hour
1	Retrainees, Job Creation	147	\$20.00	55	\$1,100	8-200
2	Retrainees	404	\$18.00	25	\$450	8-200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details on the proposed Training Project.

1. Company Background

Founded in 1947 and headquartered in Sacramento, Villara is an HVAC contracting and sheet metal fabricating company. The Company provides renovation and new construction services for residential and commercial customers. In addition, Villara provides the following installation services: structured wiring, security systems, home theaters, central vacuums, plumbing, electrical, solar, and fire protection.

Villara's business model combines HVAC, plumbing, low-voltage wiring, solar photovoltaic, and electrical work skill sets. This model allows tasks that were previously completed separately to be completed simultaneously, shortening project completion time and reducing project cost. Villara has facilities in Fresno, Sacramento, San Joaquin, Santa Clara, and Solano Counties, all which will participate in the training proposal.

2. Current Training Project Details

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

<i>Purpose of Training</i>	<p>This is Villara's fourth ETP Agreement, the third in the past five years. In its first ETP Agreement, Villara focused on green technology with training in the manufacturing and installation of pre-cooler devices and solar panels. In their second and third ETP Agreements, Villara focused on upgrading incumbent workers' skills with training in HVAC installation, 3D printers, sheet metal manufacturing, Home Energy Rating System (HERS) testing, as well as Customer Relations Management (CRM) and Systems Applications & Products (SAP) software. In this new proposal, Villara will provide the same types of training as in previous Agreements. The Company will also provide additional training in new equipment, software upgrades, and production processes. There will be no duplication of training for trainees who participated in the prior contract.</p> <p>To remain competitive, Villara must improve processes. The Company must provide staff training to standardize procedures. Training will consist of classroom and hands-on training conducted by in-house experts. Staff will receive cross-training in the areas of HVAC, plumbing, electrical, machining, and administration. Villara also invested in a new software, Canvas, and upgraded AutoCad and SAP software to improve business operations. Training will give employees the tools necessary to navigate these systems.</p> <p>Additionally, Villara invested \$1M on new machinery such as new gutter machines that bend and cut sheet metal. New machinery will require the Company to provide workers with technological and process improvement skills training necessary to be efficient and productive.</p> <p>Villara has emphasized the importance of training by investing in Success Factors, an internal learning management and applicant tracking system. Administration and Management Staff will receive training in Success Factors to improve administrative processes and efficiencies. The Company has also implemented an internal career path system allowing trainees to promote within and earn pay increases when certain levels of training are achieved.</p> <p>Villara reports a continued increase in demand due to a resurgence in the Northern California housing market. As a result, the Company is forecasting growth of</p>
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	approximately 15% annually for the next two years. To support increased business and expected growth, Villara is expanding existing business capacity by adding 147 newly-hired employees (Group 1) to existing job functions. The Company will be hiring Installers, Service Technicians, Warehouse Staff, Manufacturing Staff, and Administrative Staff.
Training Infrastructure and Administrative Plan	The Human Resources Manager is dedicated to coordinating all training efforts, including scheduling, collecting trainee enrollment data and rosters, verifying training and retention, participating in ETP monitoring activities, and ensuring compliance with all ETP requirements. The Company also has a designated person at each facility to provide administrative support including assisting with roster collection.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Sample Curriculum

Provided below is a summary of the methods by which training will be delivered including a sample of the courses that will be offered.

Each of the Trainee groups will be able to take courses under the various delivery methods.

Delivery Method	Classroom/Simulated Laboratory
Training Type/Level	Sample Classes
Business Skills	Critical Thinking
	Handling Difficult Customers
	Project Management
Commercial Skills	HVAC Installation and Maintenance
	OSHA 10/30
	Retrofit
Computer Skills	AutoCad
	Canvas
	Microsoft Products (Intermediate/Advanced)
Manufacturing Skills	Coil Line for Plasma Table
	Gutter Machine
	Metal Fabrication
Delivery Method	Productive Lab
Training Type/Level	Sample Classes
Commercial Skills	HVAC Installation and Maintenance
	Plumbing

	Solar Installation
Manufacturing Skills	Coil Line for Plasma Table
	Gutter Machine
	Metal Fabrication

4. Additional Company or Training Project Details

Productive Lab:

Productive Lab (PL) training will allow practical, hands-on experience in a working environment without creating excess waste. Trainees may produce goods for profit as part of the PL training in the courses identified under the Curriculum. Training will be taught by subject matter experts with demonstrated knowledge and expertise in the field.

Villara is requesting Commercial Skills PL training for approximately 180 Installers and Service Technicians. This training will include HVAC Installation and Maintenance, Plumbing, Retrofit, Solar Installation, and Service and HERS Testing. The environment in which Installers complete their work cannot be recreated in a class/lab environment.

The Company is also requesting Manufacturing Skills PL training for approximately 20 Manufacturing and Warehouse staff. Equipment to be used includes Gutter Machines, Coil Lines, and metal fabrication machines. Since factory equipment operations cannot be reproduced in a classroom setting, PL training is necessary to ensure safety and production standards are being met.

Training will be under constant supervision with a 1:3 trainer-to-trainee ratio. Villara has requested a 1:3 ratio because trainees work in groups of 2-3 when assigned to a machine or on the job site. PL training will be capped at 60 hours per trainee.

4.1 Program Waivers

The next table lists the various waivers and supporting justifications for training that apply to this proposed Training Project.

Waivers/Justification Type	Summary
Reduced Standard Wage (HUA)	34 trainees in Group 2 work in a High Unemployment Area (HUA), a region with unemployment exceeding the state average by at least 25%. The Company's Fresno and San Joaquin facilities qualify for HUA status under these standards. Villara is asking for a wage modification for these trainees.

4.2 Subcontractor Summary

Villara retained the services of the following Subcontractor(s).

Subcontractor Type	Subcontractor Name	City	Service Cost
Development	None identified		
Administrative	None identified		
Training	None identified		

4.3 Previous ETP Project Summary

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

Active Contract(s) Elements	Summary
Agreement Number	ET15-0459
Purpose of Training	Villara focused on upgrading incumbent workers' skills with training in HVAC installation, sheet metal manufacturing, Home Energy Rating System (HERS) testing, as well as Customer Relations Management (CRM) and Systems Applications & Products (SAP) software. Training in new equipment and software included a 3D Printer and Plasma Arc Metal Cutting Machine.
Location(s)	Fresno, Sacramento, San Joaquin, Santa Clara, Solano counties
Term	6/30/2015 – 06/29/2017
Approved Amount	\$219,360
Projected earnings	\$219,360
Performance Percentage:	100%
Other Notes	Based on ETP Systems, 14,832 reimbursable hours out of a potential 12,084 hours have been tracked. The Contractor projects final earnings of 100% based on training completed. All trainees are expected to successfully complete retention periods.

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

Past Contract Activity				
Agreement Number	Location(s)	Term	Contract Amount	Performance %
ET14-0372	San Joaquin, Sacramento	6/1/2014 – 5/30/2016	\$12,960	100%

4.4 Supporting Panel Proposal Documentation

Provided in Attachments 1, 2 and 3 is additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 1 – Group and Job Title Details

Attachment 1

The proposed Training Project includes training for the following Trainees, organized by training group.

Group #: 1 – Retraitees, Job Creation				
County		ETP Minimum Wage		
Fresno		\$13.22		
San Joaquin		\$13.22		
Santa Clara		\$14.69		
Solano		\$13.22		
Sacramento		\$13.72		

Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post Retention Wage
Fresno County				
Installers	1	\$12.28 - \$25.30	\$0.94	\$13.22
San Joaquin County				
Installers	14	\$12.28 - \$23.00	\$0.94	\$13.22
Santa Clara County				
Installers	26	\$13.51 - \$28.75	\$1.18	\$14.69
Solano County				
Installers	10	\$13.51 - \$28.75	\$0.00	\$13.51
Sacramento County				
Installers	70	\$12.28 - \$23.00	\$1.44	\$13.72
Service Technicians	2	\$13.28 - \$24.00	\$0.44	\$13.72
Warehouse Staff	2	\$12.31 - \$26.00	\$1.41	\$13.72
Manufacturing Staff	2	\$12.31 - \$26.00	\$1.41	\$13.72
Administrative Staff	20	\$12.31 - \$40.00	\$1.41	\$13.72

Group #: 2 Retraitees	
County	ETP Minimum Wage
Fresno (HUA)	\$12.12
San Joaquin (HUA)	\$12.12
Santa Clara	\$17.63
Solano	\$16.16
Sacramento	\$16.46

Attachment 1 – Group and Job Title Details

Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied	Post Retention Wage
Fresno (HUA)				
Installers	1	\$12.28 - \$25.30	\$0.00	\$12.28
San Joaquin (HUA)				
Installers	24	\$12.28 - \$23.00	\$0.00	\$12.28
Service Technicians	8	\$12.28 - \$23.00	\$0.00	\$12.28
Administrative Staff	1	\$12.28 - \$23.00	\$0.00	\$12.28
Santa Clara				
Installers	64	\$16.17 - \$28.75	\$1.46	\$17.63
Warehouse Staff	1	\$16.17 - \$28.75	\$1.46	\$17.63
Administrative Staff	1	\$16.17 - \$28.75	\$1.46	\$17.63
Solano				
Installers	23	\$14.70 - \$28.75	\$1.46	\$16.16
Service Technicians	1	\$14.70 - \$28.75	\$1.46	\$16.16
Sacramento				
Installers	200	\$15.00 - \$28.75	\$1.46	\$16.46
Service Technicians	10	\$15.00 - \$28.75	\$1.46	\$16.46
Warehouse Staff	10	\$15.00 - \$26.00	\$1.46	\$16.46
Manufacturing Staff	10	\$15.00 - \$26.00	\$1.46	\$16.46
Administrative Staff	50	\$15.00 - \$40.00	\$1.46	\$16.46

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method</i>	<i>Classroom/Simulated Laboratory</i>
Training Type	Planned Course Offerings
<i>Business Skills</i>	
	Business Ethics
	Customer Service
	Change Management
	Coaching and Mentoring
	Critical Thinking
	Goal Setting & Getting Things Done
	Handling Difficult Customers
	Project Management
<i>Commercial Skills</i>	
	Hazardous Environment Reporting
	Heat Illness
	HVAC Installation and Maintenance
	Ladder Safety
	Loading/Unloading
	OSHA 10
	OSHA 30
	Parts Recognition
	Personal Protective Equipment (PPE)
	Plumbing
	Power Tools Safety
	Retrofit
	Safety Data Sheet (SDS)
	Service and HERS Testing
	Solar Installation
<i>Computer Skills</i>	
	AutoCad
	Canvas
	Global Positioning System (GPS)
	Microsoft Products (Intermediate/Advanced)
	Success Factors - Applicant Tracking System (ATS)
	Success Factors - Learning Management System (LMS)
	Systems, Applications & Products (SAP)
<i>Manufacturing Skills</i>	
	CAD Design
	Coil Line for Plasma Table

Attachment 2 - Training Delivery and Curriculum Listing

<i>Delivery Method</i>	<i>Classroom/Simulated Laboratory</i>
Training Type	Planned Course Offerings
	Gutter Machine
	Metal Fabrication
<i>Delivery Method</i>	<i>Productive Laboratory</i>
Training Type	Planned Course Offerings
<i>Commercial Skills</i>	
	HVAC Installation and Maintenance
	Plumbing
	Retrofit
	Service and HERS Testing
	Solar Installation
<i>Manufacturing Skills</i>	
	CAD Design
	Coil Line for Plasma Table
	Gutter Machine
	Metal Fabrication

Attachment 3 - Training Project Characteristics Details

Provided in the table are details on the training characteristics.

Characteristic	Program Summary
Retrainee - Job Creation	<p>The Panel incentivizes job creation. Training for newly-hired employees is reimbursed at a higher rate, and trainees are subject to a lower post-retention wage. Substantial Contribution and Turnover Rate penalty requirements do not apply. Employer must demonstrate expanded or new facilities, new equipment or machinery, expanded business capacity or other measureable investment in hiring workers and expanding their California workforce.</p> <p>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.</p>



Training Proposal for:
Apprentice & Journeymen Training Trust Fund of the
Southern California Plumbing and Piping Industry

Agreement Number: ET18-0901

Panel Meeting of: June 23, 2017

ETP Regional Office: North Hollywood

Analyst: M. Webb

PROJECT PROFILE

Contract Attributes:	Apprenticeship Retrainee Priority Rate Veterans	Industry Sector(s):	Construction Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Imperial, Inyo, Kern, Los Angeles, Orange, San Bernardino, San Diego, San Luis Obispo, Santa Barbara, Riverside, Ventura	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Southern California Pipe and Trades District Council 16		
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		N/A	

FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$887,640		\$61,581 8%		\$949,221

In-Kind Contribution:	50% of Total ETP Funding Required	Inherent
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	
				Class / Lab	CBT		
1	Retrainee Apprentice	Comm'l. Skills, OSHA 10/30	350	8-200	0	\$2,002	\$22.04
				Weighted Avg: 144			
2	Retrainee Apprentice Veterans	Comm'l. Skills, OSHA 10/30	60	8-200	0	\$2,002	\$22.04
				Weighted Avg: 144			
3	Retrainee Journeymen Priority Rate	Comm'l. Skills, Computer Skills, Cont. Imp., OSHA 10/30	91	8-200	0	\$1,411	\$50.78
				Weighted Avg: 60			

Minimum Wage by County: \$22.04 per hour Statewide (Priority Industry).

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

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

	Wage Range	
Job Number 1		
Apprentice Plumber and Pipefitter	\$25.39-\$51.13	350
Job Number 2 (Veterans)		
Apprentice Plumber and Pipefitter	\$25.39-\$51.13	60
Job Number 3		
Journeymen Plumber and Pipefitter	*\$50.78-\$66.36	91

*The wage range for Journeymen is due to cost-of-living adjustment by geographic region.

INTRODUCTION

Founded in 1959, the Apprentice & Journeymen Training Trust Fund of the Southern California Plumbing & Piping Industry (P&P Trust) (www.ajtraining.org) is governed by a joint Board of Trustees.

Employer representation is through the California Plumbing and Mechanical Contractors Association and Southern California Pipe Trades District Council No. 16 of the United Association. Union representation is through District Council 16 of the United Association of Journeymen and Apprentices of the Plumbing and Pipefitting Industry of the United States and Canada, which represents 12 local unions in Southern California (Local Unions 78, 114, 230, 250, 345, 364, 398, 403, 460, 484, 582, and 761).

The District Council 16 region includes multiple Joint Apprenticeship Training Committees (JATC) acting as program sponsors, with joint labor-management leadership. Together with the P&P Trust, they operate 10 training centers in Southern California.

Approximately 3,400 Apprentices and 12,000 Journeymen receive training in the District Council 16 region. The employers include plumbing and mechanical contractors, building and plant owners, fabricating shops, manufacturing companies, and electric power companies.

Apprenticeship Program

The Panel is authorized to fund Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). ETP funding is designed to supplement cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. Depending on the type of trade, apprenticeship programs vary in length. In this case the programs are five years.

For the building trades, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by \$5, reducing the priority industry rate from \$18 to \$13 per hour. In addition, the Panel adopted a "blended rate" for Journeymen, reflecting the fact that they may be employed by a variety of contractors over the two-year term of contract ranging from large employers, to small (≤ 100 employees). This is \$22 per hour, midway between the Priority Industry standard rate (\$18) and Small Business rate (\$26).

The ETP wage for Apprentices is no less than \$22.04 per hour, tracking the Special Employment Training wage as modified for priority industries. However, the actual wages paid are shown in the Training Plan Table and contract when they exceed \$22.04, for both Apprentices and Journeymen.

PROJECT DETAILS

Employers currently face a national shortage of workers trained in energy efficient "green" building technologies and procedures. The demand for workers skilled in green building systems is high in California, California Building Energy Efficiency Standards (Title 24) require higher levels of efficiency for all building and construction trades. These standards are part of the State's response to AB 32, the Global Warming Solutions Act of 2006, which mandates that California reduce its greenhouse gas emissions to 1990 levels by 2020. In addition, training is needed to prepare skilled craftsmen to work in specialized jobs and to replace retiring baby boomers.

P & P Trust provides training for Apprentices and Journeymen in service and repair work. Trainees are taught techniques and methods in planning, designing, and installing low and high pressure steam systems for geothermal plants, manufacturing plants and oil refineries. Skill sets include pipe fabrication, assembly, electronic control work, air and water balance, appliance service and repair, gas fitting, quality control, and in plant operation of mechanical systems.

Apprentice training provided will introduce workers to the basics in the industry. Trainees will learn the different plumbing/piping draining systems such as water, gas, waste, and vent systems, isometric drawing, water sizing, fittings, material handling, safety, and tools and hardware.

Specialized training for Journeymen will include valve repair, medical gas installation, refrigerant handling, welding, industrial rigging, green awareness, and instrumentation. Training provided will lead to certifications that are recognized nationally in the pipe trades. These training modules are not included in the pipe trades apprenticeship programs. For example, Commercial Skills training will focus on energy efficiency, environmental design and water conservation.

Training Plan

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

Commercial Skills (95%) Training will be offered to all occupations to increase worker skill sets in the piping and plumbing industry.

Computer Skills (2%): Training will be offered to Journeymen to ensure trainees can use computer software programs used by Employers. Course titles will include project management software and Computer-Aided Design.

Continuous Improvement (2%): Training will be offered to Journeymen to improve communication and problem solving skills. Staff will learn new techniques in project management and strategic planning.

OSHA 10/30 (1%): 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, although P & P Trust reports that contractors are requesting OSHA 10/30 for Apprentices, as well as Journeymen. 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.

LMS

Staff has reviewed and approved P&P Trust’s use of a Learning Management System for recordkeeping.

Commitment to Training

Employers will continue to make contributions to the training trust for every hour worked by Apprentices and Journeymen.

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

➤ Training Infrastructure

P & P Trust has hired Steve Duscha Advisories and the Los Angeles Unified School District to complete administration duties required in this Agreement. P & P Trust has assigned five staff members who will schedule all training sessions, and complete and collect training rosters that will be entered into their LMS. Third party administrators will assist by uploading training and enrollment data to ETP, document training hours, and provide assistance as an employer liaison.

Marketing and Support Costs

Employers are notified of training through the association web sites, mailings, and presentations. Employers participate as members of the joint committee that operates the P & P Trust and training is designed around their needs and the general needs of the industry. Assessments are conducted at the conclusion of each training class, and trainee feedback is provided through union representatives on the joint apprenticeship committee.

Curriculum for this project has been developed by the piping industry and includes input from national and local unions. Training materials, curriculum, and facilities have been updated on a continuous basis to ensure trainees are provided the latest in technologies and methodologies in the industry. P & P Trust requests, and staff supports, 8% support costs to assist in Apprentice recruitment, employer outreach, and assessment of employer-specific job requirements.

Trainer Qualifications/Coordinator

Employees of P & P Trust will provide all training under this project. Trainers are experienced journey level workers who are considered experts in the piping and plumbing field. Training is center-based and provided at P & P Trust locations.

Tuition Reimbursement

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

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by P & P Trust under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0900	\$949,221	07/01/16- /06/30/18	1,147	1,141	319

Based on ETP Systems, 99,252 reimbursable hours have been tracked for potential earnings of \$949,221 (100% of approved amount). All training under this Agreement has been completed, and a total of \$407,721 has been approved as earned for 319 trainees. Final payments will be submitted by July 2017.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0919	Van Nuys	03/02/15- 03/01/17	\$649,905	\$649,905 (100%)
ET14-0909	Van Nuys	12/14/13- 12/13/15	\$1,200,549	\$1,200,549 (100%)
ET13-0901	Compton	09/04/12- 09/03/14	\$698,826	\$698,826 (100%)
ET11-0234	Compton	05/02/11- 05/01/13	\$398,680	\$390,429 (98%)

DEVELOPMENT SERVICES

Steve Duscha Advisories in Sacramento assisted with development for a flat fee of \$10,000.

ADMINISTRATIVE SERVICES

Steve Duscha Advisories and the Los Angeles Unified School District in Los Angeles perform administrative services for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

N/A

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

8-200

Trainees may receive any of the following:

Journeyman Training**COMMERCIAL SKILLS**

- Advanced Instrumentation
- Asbestos Awareness
- Backflow Prevention
- Basic Instrumentation/EPRI Level I
- Clean Room/Orbital Welding
- Competent Person
- Confined Spaces
- Crane Signal Person
- Design and Installation of New Equipment for Energy Efficiency
- Energy Efficiency in Existing Equipment
- EPRI Level II
- Fitter NITC
- GPro: Building Green, Green Plumbing, Green Mechanical Systems
- HDPE
- Industrial Pipefitter Refinery Training
- Instrumentation Classes
- L.A. Structural Steel
- LEED Standards
- LEED Documentation and Rating System
- Medical Gas
- Mine Safety & Health Administration
- Pipeline Safety
- Plumber NITC
- Renewable and Sustainable Fuel Sources
- Rigging Techniques
- Safety Classes
- Service & Repair - Tankless Water Heater Installation & Troubleshooting
- Service & Repair - Water Heater Repair
- Trimble & Sokia Robotic Total Station Training
- Tube Bending
- UA Foreman
- UA Industrial Rigging
- UA Industrial Rigging Classes
- Valves
- Water Conservation

COMPUTER SKILLS

- Computer Literacy for Plumbers and Pipefitters
- Working with Files
- Basic Computers
- CAD
- Using Project Management Software

CONTINUOUS IMPROVEMENT

- Project Management
- Communications Skills
- Strategic Planning
- Problem Solving
- Quality Concepts

OSHA 10/30 (Certified OSHA Instructor)

- Cal OSHA 10 (requires 10hrs completion)
- Cal OSHA 30 (requires 30hrs completion)

Apprentice Training**COMMERCIAL SKILLS**

- Introduction to OSHA
- Hazard Communication
- Personal Protective Equipment
- Material Handling
- Electrical Safety
- Tool Safety
- Scaffold Safety
- Fall Protection
- Stairways and Ladders
- Confined Spaces
- Mathematics used in the Piping Trades
- Units of Measurement
 - “Rigging” in the Piping Trades
- Materials, Hardware and Tools Associated with “Rigging”
- Incorporate Units of Measuring and Mathematical Formulas with “rigging”
- Use of Copper and Acetylene Torches
- Gas Distribution Systems and their Components
- UPC and other Administrative Authorities
- Fittings, Pipes, Appliances and Materials
- Drainage Systems and their Components
- Water Treatment
- Water Treatment & Water Sizing
- Water Mains & Water Sizing
- Water Mains & Services
- Building Water Systems
- Hot water Supply & Water Sizing

- Introduction to Basic Drawing Tools, Measuring Tools & Lettering Skills
- Three View, Plan View and Elevation View Drawings
- Graphic Symbols for Pipe Fittings and Valves
- Interpretation of Technical Diagrams and Piping Drawings
- Interpretation of Isometric Drawings
- Service & Repair/Fixtures & Controls
- Basic Electricity, Pneumatics, Hydraulics & Servicing of Gas/Electrical Appliances
- Failure Analysis
- Advanced Drawing
- Isometric Drawings
- Drawing Structural Backgrounds
- Drawing Sleeves on Structural Backgrounds
- Drawing Sleeves without Dimensions
- Review other Trades Drawings
- Design & Layout
- Isometric Drawing of Water, Water Gas, Waste and Vent Systems
- Plan View Drawing of Water, Gas Waste and Vent Systems
- Material Take-Off List for Installation
- Laying Out Trenches, Figure Grade and Backfill
- Ordering Material for the Job Site and Maintain an Inventory
- Using the Uniform Plumbing Code as a Guide to Maintaining Standardization and Safety while Installing Plumbing Systems to Meet Minimum Requirements, with Consumer Cost in Mind
- Fundamentals of Welding
- How to Strike and Maintain an Arc with S.M.A.W. Process
- Flat, Vertical and Overhead Positions with 610 and 7018 Welding Rod on Plate
- General Knowledge of Oxy fuel and ARC Welding Safety
- Flame Cut and Bevel Pipe
- Proper use of Grinders for Welding Preparation
- Welding Techniques for Plate and Pipe
- Weld Rod Designations, AMP Settings and Polarity
- Creating Models and Estimating
- Qualities and Role of a Leader
- Using Computer-Based Technologies to Manipulate, Create, Store and Retrieve Information to Express Ideas and Communicate w/Others
- Medical Gas Installer & Brazing

OSHA 10/30 (Certified OSHA Instructor)

- OSHA 10 (requires 10hrs completion)
- OSHA 30 (requires 30hrs completion)

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

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



Training Proposal for:
Chaffey Community College District
Agreement Number: ET18-0110

Panel Meeting of: June 23, 2017

ETP Regional Office: North Hollywood

Analyst: E. Wadzinski

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate SB <100 Medical Skills Training SET	Industry Sector(s):	Manufacturing Services Transportation/Logistics Aerospace and Defense Healthcare Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Bernardino, Riverside, Los Angeles, Orange, San Diego	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No United Steel Workers of America, Teamsters Local 12-49		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	≤20%		

FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$888,520		\$60,914 8%		\$949,434

In-Kind Contribution:	50% of Total ETP Funding Required	\$950,000
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Commercial Skills, Computer Skills, Cont. Impr., Literacy Skills, HazMat, OSHA 10/30, Mgmnt. Skills, Mfg. Skills	618	8-200	0	\$539	\$16.16
				Weighted Avg: 28			
2	Retrainee	Business Skills, Commercial Skills, Computer Skills, Cont. Impr., Literacy Skills, HazMat, OSHA 10/30, Mgmnt. Skills, Mfg. Skills	781	8-200	0	\$256	\$16.16
				Weighted Avg: 16			
3	Retrainee SB<100 Priority Rate	Business Skills, Commercial Skills, Computer Skills, Cont. Impr., Literacy Skills, HazMat, OSHA 10/30, Mgmnt. Skills, Mfg. Skills	230	8-200	0	\$1,112	\$16.16
				Weighted Avg: 40			
4	Retrainee SB<100	Business Skills, Commercial Skills, Computer Skills, Cont. Impr., Literacy Skills, HazMat, OSHA 10/30, Mgmnt. Skills, Mfg. Skills	102	8-200	0	\$564	\$16.16
				Weighted Avg: 24			
5	Retrainee SET Priority Rate Medical Skills	MS - Didactic	298	8-200	0	\$346	\$22.04
				Weighted Avg: 18			

Minimum Wage by County: Job Numbers 1, 2, 3 and 4: \$16.16 in San Bernardino and Riverside, Counties; \$16.72 in San Diego County; \$17.22 in Orange County; and \$16.96 in Los Angeles County. Job Number 5 (SET/Priority Industry): \$22.04 per hour

Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums.

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Numbers 1-4		
Administrative	\$15.20-\$37.01	180
Logistics	\$16.00-\$35.34	200
Maintenance	\$16.00-\$30.12	200
Industrial Electrical Tech	\$16.00-\$30.14	158
Operator	\$16.00-\$29.67	200
Production	\$16.00-\$30.29	220
Manufacturing	\$16.00-\$28.97	220
Supervisor	\$16.00-\$46.00	153
Manager	\$22.84-\$52.84	100
Frontline Supervisor	\$16.00-\$35.00	100
Job Number 5		
Licensed Vocational Nurse (LVN)	\$20.50-\$28.29	120
Registered Nurse (RN)	\$33.00-\$45.54	160
Therapist	\$20.50-\$35.00	18

INTRODUCTION

Founded in 1883, Chaffey Community College District (Chaffey) (www.chaffey.edu) is a two-year public community college accredited by the Western Association of Schools and Colleges. Operating through its own Workforce Training Institute (Institute), Chaffey has three campuses offering credit courses in Rancho Cucamonga, Fontana, and Chino (two off-site training centers). This is Chaffey's seventh training proposal for ETP funding.

Chaffey serves participating employers primarily in San Bernardino, Riverside, Los Angeles, and Orange counties, and maintains relationships with manufacturing and logistic industry groups. Chaffey also collaborates with local chamber of commerce boards, workforce preparation programs, economic development departments, the County of San Bernardino, the Workforce Development Board of San Bernardino County, business advisory boards, and non-profit agencies to further promote economic growth within the Inland Empire. Chaffey's involvement with these groups allows it to stay abreast of current and changing business needs in multiple industries.

This proposal is to train workers in large and small, priority and non-priority businesses with out-of-state competition in manufacturing, aerospace, logistics, distribution, electrical, and service industries. Training will also be provided to healthcare, and other employers under the SET program. The majority of the participating employers will be located in San Bernardino and Riverside Counties, but training will extend to companies in surrounding area. The core group of employers represents over 100% of the planned trainees.

Union Support

Included in the core group of employers, are trainees represented by United Steel Workers of America, Teamsters Local 12-49 who has submitted a letter of support.

PROJECT DETAILS

Chaffey conducted several assessments with business representatives to identify employer training needs. In the manufacturing industry, employers need to upgrade worker skillsets to remain competitive in the changing economy. Logistics & distribution employers need to implement procedures and respond to the changing economy. Healthcare employers need to improve patient care. Construction industry employers need to promote from within and increase retention to remain competitive with out-of-state companies bidding on California projects.

In addition, small businesses have experienced a tremendous amount of growth in business demand, projected to increase over the next two years. At the same time, many small businesses lack computer, literacy, and business skills for their front-line workers. As such, small businesses need to train their entry level, lead, and middle managers to be able to handle the anticipated production growth.

Overall, employers need to meet productivity goals and client demands, and to develop electrical/mechanical skills for workers for manufacturing and logistics. Employers need to develop frontline worker leadership skills.

ETP-funded training will provide technical, computer, literacy, quality, leadership, and business skills. Training will be customized to employers. Sixty-five percent of training will take place at employers' worksites, and 35% at college facilities.

Training Plan

Business Skills (15%): Training will be offered to all occupations except RN, LVN and Therapist to provide skills to generate business and financial reports, improve written and verbal communications, increase product knowledge, build leadership skills and improve quality customer service.

Commercial Skills (15%): Training for Logistics, Industrial Electrical Technician, Maintenance, Manufacturing, Operators, Production, Frontline Supervisors and Managers/Supervisors will be customized to meet the individual needs of each business. Training will cover the automotive, HVAC and electrical industries.

Continuous Improvement (20%): Training will be provided to all occupations except RN, LVN and Therapist. Training is designed to help workers reach business and production goals, increase productivity and product quality, develop teamwork strategies to enhance performance, and improve business processes.

Computer Skills (10%): Training will be provided to all occupations except RN, LVN and Therapist. Training will be customized to meet the individual needs of each business. In addition, training will be provided to improve basic computer literacy skills of frontline workers.

Manufacturing Skills (5%): Training for Maintenance, Manufacturing, Operators, Production, and Managers/Supervisors is designed to improve productivity, efficiency, quality and reduce waste. These skills will help improve employee proficiency in equipment operation, assembly

procedures, and warehousing, as well as empower frontline workers to identify and resolve production problems to improve processes.

Management Skills (10%): Training will provide Managers/Supervisors with skills to coach teams and individuals, improve team and individual performance and track process improvement.

Literacy Skills (5%): Training for Administrative, Logistics, Maintenance, Manufacturing, Operators and Production will include basic math and VESL training and will be offered primarily to help staff improve job skills, overall performance, and communication with supervisors and co-workers. Training will be customized based on individual trainee needs and will not exceed 45% of the total number of hours per trainee.

Medical Skills-Didactic Training (15%): Training will be offered to LVNs, RNs and Therapists to increase skills in Advanced Cardiac Care, Concentrated Rhythm Strips, Ventilator Training, Telemetry Technician Monitoring, Physical Assessment, and other topics identified by the client.

Certified Safety Training

OSHA 10/30 (3%) – Training will be provided to Logistics, Maintenance, Manufacturing, Operators, Production, Frontline Supervisors and Managers/Supervisors. This training is a series of courses “bundled” by industry sector and occupation. It consists of 10 hours of classroom training for frontline workers and 30 hours for frontline supervisors. The coursework is geared to construction and manufacturing. Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

Hazardous Materials (HAZMAT) (2%) – Training will provide Manufacturing, Operators, Production, and Frontline Supervisors with the skills needed to safely handle and dispose of hazardous materials on the jobsite. This training is also a series of courses, specific to industry sectors involved in the transport of hazardous materials. The coursework varies in length depending on the industry and the occupational title, as organized in five levels ranging from “first responder” to “incident commander.” It is generally a minimum of 24 hours with an 8-hour annual refresher, and will be delivered by classroom training. Completion of the training results in a certificate that expands employment opportunities.

Apprenticeship Evaluation

The curriculum for Industrial Electrical Technicians/Maintenance Mechanics has been assessed with Electrical Apprenticeship programs offered through Joint Apprenticeship Training Committees in the Inland Empire (Riverside and San Bernardino counties). The curriculum does not duplicate courses offered through an established union apprenticeship program offered in these counties.

Special Employment Training

Under SET, the participating employer is not required to demonstrate out-of-state competition. To qualify under SET, trainees must be earning at least the statewide average hourly wage at the end of the retention period (Job Number 5). For priority industries such as healthcare, the modified statewide average hourly wage is \$22.04 for trainees in Job number 5.

Impact/Outcome

The proposed comprehensive training programs will help companies find innovative ways to meet and exceed their goals, increase the skills of their workforce, and improve effectiveness, efficiency, and strategic performance. This will help organizations grow and remain competitive in the global marketplace. ETP funds will facilitate employer access to training through a combination of customized center-based and on-site courses.

Chaffey assesses training results through successful completion of training, mastery of subject matter as documented through evaluations and trainer assessments, utilization of the skills learned as the trainee returns to the workplace, and the successful completion of the 90-day retention period as defined by ETP.

Every trainee receives a certificate of professional development documenting the training type and number of hours completed. Six Sigma Green and Black Belt projects are certified by project and exam by the Six Sigma Master Black Belt trainer. Medical Skills trainings are provided certification through assessment by the subject matter expert.

Commitment to Training

ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law. The training needs expressed above are ones that employers are unable to meet with their existing, in house training resources. Typical employer-provided and covered training include new-hire orientation or onboarding, job specific training, job shadowing, harassment preventions, diversity, and state and federally mandated training courses.

➤ **Training Infrastructure**

This program will be administered by Chaffey. One part-time and two full-time employees will be responsible for marketing, recruitment, needs assessment, coordinating and scheduling training, and complying with ETP recordkeeping requirements. The infrastructure of a community college setting allows Chaffey to facilitate effective and efficient business practices.

Marketing and Support Costs

Chaffey markets and recruit's employers via local Chambers of Commerce, HR Network Groups, local Workforce Development Departments, the Inland Empire Desert Regional Consortium, through the Manufacturer's Council of the Inland Empire meetings, and email blasts/phone calls to their employer database as well as individual meetings with clients. Additionally, representatives of the College regularly reside on workforce investment boards, business advisory and non-profit agency boards to further promote economic growth within the Inland Empire.

One full-time employee is dedicated to recruiting employers, while many referrals come from existing clients, various industry groups, consortiums, and councils in which Chaffey participates. Many of these clients have received training in the past, and maintain regular contact regarding new and advanced educational opportunities for their workers. Chaffey also offers a continual calendar of center based training requested by industry to multiple employers year-round. Small employers have easy access to training, since for the most part they are unable to fill an entire class with only their employees. Additionally, customized, on-site training is added to the schedule as the need and interest arises.

Chaffey is requesting 8% support costs to cover the cost of recruiting additional participating employers, assessing their specific training needs, developing job-specific curricula and training schedules, and conducting necessary follow-up during retention. This will be an ongoing activity throughout the duration of the Agreement. Staff recommends the 8% Support Costs.

Substantial Contribution

Chaffey serves large and small companies, some of which may have received training in prior ETP contracts. If a large participating employer (over 100 full-time employees) has received the benefit of training with payment earned in excess of \$250,000 within the past five years, reimbursement for trainees at the same facility will be reduced by 15% to reflect that employer's substantial contribution to the cost of training. Funding for any employer that has previously been assessed a substantial contribution will be reduced by 30%. Small businesses with 100 or fewer full-time employees are not subject to this provision.

Tuition Reimbursement

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

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET16-0196	\$563,817	09/01/15-08/31/17	772	683	439

Based on ETP Systems, 23,630 hours have been tracked for trainees who have completed the minimum number of training hours for potential reimbursement of an estimated \$478,842 (85%) of the \$563,817 Agreement amount. At this time, 439 trainees have completed training and retention. Chaffey anticipates it will earn 100% of the Agreement amount.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
*ET14-0170	Statewide	11/1/13-10/31/15	\$1,021,010	\$592,426 (58%)
ET13-0116	Statewide	8/27/12 – 8/26/14	\$650,597	\$647,258 (99%)
ET11-0248	Statewide	6/1/11 – 5/31/13	\$394,807	\$334,749 (99%)

*Low performance was due to a leadership transition and shift in the organizational structure of the department soon after approval of the ETP project. As a result, minimal training occurred during the first six months of the contract. New staff's learning curve in marketing and project administration posed additional delays in performance. But, since then, Chaffey has a dedicated and experienced team in place, and established processes to ensure success on their most recent Agreement (ET16-0196).

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

To Be Determined

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

8-200

Trainees may receive any of the following

BUSINESS SKILLS

- Behavioral Interviewing
- Business Impact
- Communication Skills
- Conflict Management
- Customer Service
- Decision-Making
- Finance for the Non-Financial Manager
- Getting Business Results
- Group Effectiveness
- Interpersonal Skills
- Inventory Control
- Negotiation
- Personal Effectiveness
- Product Knowledge
- Project Management
- Scheduling, Budgeting and Cost Control
- Telephone Skills
- Time Management

COMMERCIAL SKILLS

- Advanced Math
- AC & DC Variable Speed Drives
- Analog Communications
- Automotive Repair
- Aviation Mechanical Skills/Aircraft Maintenance
- Basic/Intermediate PLCs
- Cable Networking the Physical Layer
- Control Systems
- Copper and Plastic Piping Practices
- Drills and Related Tools
- Electro-Pneumatics I & II
- Fiber Optic Cabling the Physical Layer
- Forklift Training
- Fasteners and Anchors
- Gaskets and Packing
- Lubrication
- Heaters, Furnaces, Heat Exchangers, Cooling Towers & Fin Fans
- High Pressure Steam Systems and Auxiliaries
- HVAC EPA 608 & 609
- Hydraulics I & II
- Industrial Electrical Safety Training
- Instrumentation & Process Controls I & II
- Intermediate/Advanced Electricity & Motor Operation for Manufacturing Technicians

- Lathes
- Low-Pressure Steam Systems
- Lubrication
- Material Handling & Hand Rigging
- Milling Machines
- Mobile and Support Equipment
- Oxyfuel Cutting
- Precision Measuring Tools
- Preventive and Predictive Maintenance
- Pumps and Drivers
- Semiconductor Devices
- SMAW-Equipment & Set-Up
- Transistor Amplifier Circuits
- Transistor Feedback Circuits
- Transistor Power Amplifiers
- Troubleshooting and Repairing Pumps
- Troubleshooting and Repairing Gearboxes
- Troubleshooting Electrical Control Circuits
- Valves

COMPUTER SKILLS

- AutoCAD
- Budgeting
- Company-Specific Software
- Computer Networking
- Cost Tracking
- Document Control
- Inventory Control
- Managing E-mail
- Manufacturing Resource Planning/Material Resource Planning
- Microsoft Office (Intermediate & Advanced)
- MS Project
- Payroll
- Purchase Order Tracking
- Shipping Solutions or Related Logistic Software
- SolidWORKS
- World-Wide Web

CONTINUOUS IMPROVEMENT

- 5S
- Basic Logistics Standard Practices
- Certified Logistics Associate
- Certified Logistics Technician
- Change Management
- Coaching/Motivating Employees
- Communicating Effectively
- Communicating Effectively with English Language Learners
- Cost and Analysis
- Cost Reduction

- Interaction Management
- Inventory Control
- Leadership Skills for Frontline Workers
- Lean Manufacturing/Operations
- Monitoring
- Problem Solving
- Process Corrective Action
- Quality Technician Certification
- Resource Management Certification
- Scheduling and Planning
- Six Sigma (Green, Yellow and Black Belt)
- Strategic Planning
- Supervisor/Lead Role
- Supply Chain Elements
- Teambuilding
- Time Studies & Line Balancing
- Total Quality Management
- Understanding Work Group Dynamics

HAZARDOUS MATERIALS

- Hazardous Material Handling, Clean-Up and Disposal

LITERACY SKILLS

- Basic Math
- Language Comprehension
- Reading Letters and Reports
- Shop/Workplace Math
- Understanding Numbering Systems
- Understanding Verbal Direction and Instruction
- Workplace English (Vocational English – VESL)
- Writing Letters and Reports

Literacy Skills training must be job related and training hours are capped at 45% of a trainee's total training hours.

MANAGEMENT SKILLS (Managers/Supervisors Only)

- Conflict Management for Managers
- Effective Leadership/Supervisory & Management Skills
- Essential Interviewing Skills
- Leadership for Managers
- Managing a High Performance Workplace
- Planning
- Project Management for Managers

MANUFACTURING SKILLS

- Assembly Procedures
- Blueprint Reading
- CNC Machining
- Cross-Functional Production/Equipment Skills
- Equipment Operation

- Food Processing
- Geometric Dimensioning & Tolerancing
- Inspection Techniques
- Manufacturing Practices
- Non Destructive Testing
- Production Operation
- Prototyping
- Warehousing

OSHA 10/30 (Certified OSHA Instructor)

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

MEDICAL SKILLS – DIDACTIC (Job 5 Only)

- Advanced Cardiac Care
- Alzheimer's Disease and Dementia Care
- American Heart Association Advanced Cardiac Life Support Certification
- Concentrated Rhythm Strips
- IV Certification and Blood Withdrawal
- Physical Assessment Series
- Telemetry Technician Monitoring Skills
- Ventilator Training

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

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

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Chaffey Community College District

CCG No.: ET18-0110

Reference No: 17-0241

Page 1 of 9

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Able Industrial Products

Address: 2006 S. Baker Ave.

City, State, Zip: Ontario, CA 91761

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 46

Total # of full-time company employees worldwide: 75

Total # of full-time company employees in California: 46

Company: Affordable Plastics & Packaging, Inc.

Address: 739 E. Francis St.

City, State, Zip: Ontario, CA 91761

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 5

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

Company: Amcor Rigid Plastics

Address: 14270 Ramona Ave.

City, State, Zip: Chino, CA 91710

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 29,000

Total # of full-time company employees in California: 325

Company: California Steel Industries, Inc.

Address: 1 California Way

City, State, Zip: Fontana, CA 92335

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 80

Total # of full-time company employees worldwide: 880

Total # of full-time company employees in California: 880

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Chaffey Community College District	CCG No.: ET18-0110
Reference No: 17-0241	Page 2 of 9

Company: CEMEX Const. MTH PAC LLC

Address: 16888 N.E. Street

City, State, Zip: Victorville, CA 92394

Collective Bargaining Agreement(s): United Steelworkers of America, Teamsters Local 12-49

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

Total # of full-time company employees worldwide: 46,000

Total # of full-time company employees in California: 217

Company: Damco Distribution Services

Address: 5011 Firestone Place

City, State, Zip: South Gate, CA 90280

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 795

Total # of full-time company employees in California: 280

Company: DeVoll Rubber Manufacturing Group

Address: 18626 Phantom St.

City, State, Zip: Victorville, CA 92394

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 18

Total # of full-time company employees in California: 18

Company: Door Components, Inc.

Address: 7980 Redwood Ave.

City, State, Zip: Fontana, CA 92336

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 150

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

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Chaffey Community College District

CCG No.: ET18-0110

Reference No: 17-0241

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Company: DSV Solutions

Address: 13230 San Bernardino Ave., Suite B

City, State, Zip: Fontana, CA 92336

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 5,000

Total # of full-time company employees in California: 88

Company: Fabtech

Address: 4331 Eucalyptus Ave.

City, State, Zip: Chino, CA 91710

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 82

Total # of full-time company employees in California: 82

Company: Foddrill Construction Corp.

Address: 13831 Roswell Ave., H

City, State, Zip: Chino, CA 91710

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 61

Total # of full-time company employees worldwide: 61

Total # of full-time company employees in California: 61

Company: GE Aviation

Address: 18000 Phantom West Dr.

City, State, Zip: Victorville, CA 92394

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 44,000

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

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Chaffey Community College District

CCG No.: ET18-0110

Reference No: 17-0241

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Company: Hayden Industrial Products, LLC

Address: 1393 E. San Bernardino Ave.

City, State, Zip: San Bernardino, CA 92408

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 55

Total # of full-time company employees in California: 55

Company: Home Performance Matters

Address: 1081 W. 9th St.

City, State, Zip: Upland, CA 91786

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 18

Total # of full-time company employees worldwide: 18

Total # of full-time company employees in California: 18

Company: Hydronix Water Technology, LLC

Address: 1240 E. Belmont St.

City, State, Zip: Ontario, CA 91761

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 15

Company: James Hardie Building Products, Inc.

Address: 10901 Elm Ave.

City, State, Zip: Fontana, CA 92337

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 3,200

Total # of full-time company employees in California: 98

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Chaffey Community College District

CCG No.: ET18-0110

Reference No: 17-0241

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Company: KMC

Address: 20377 Sandia Road

City, State, Zip: Apple Valley, CA 92308

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 9

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

Company: Mitsubishi Cement Corporation

Address: 5808 State Highway 18

City, State, Zip: Lucerne Valley, CA 92356

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 150

Total # of full-time company employees in California: 130

Company: Neovia Logistics

Address: 5491 E. Francis St.

City, State, Zip: Ontario, CA 91761

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 5,500

Total # of full-time company employees in California: 300

Company: New-Indy Containerboard, LLC

Address: 3500 Porsche Way #150

City, State, Zip: Ontario, CA 91764

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 20

Total # of full-time company employees in California: 20

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Chaffey Community College District	CCG No.: ET18-0110
Reference No: 17-0241	Page 6 of 9

Company: New-Indy Ontario, LLC

Address: 5100 Jurupa St.

City, State, Zip: Ontario, CA 91761

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 104

Total # of full-time company employees in California: 104

Company: Oakmont Management Group

Address: 9240 Old Redwood Hwy., #200

City, State, Zip: Windsor, CA 95492

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 60

Total # of full-time company employees worldwide: 967

Total # of full-time company employees in California: 967

Company: Port Alliance

Address: 20955 Pathfinder Rd., #230

City, State, Zip: Diamond Bar, CA 91765

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 60

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

Company: Providence Healthcare Inland Empire

Address: 88 E. Fifth St.

City, State, Zip: Ontario, CA 91764

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 400

Total # of full-time company employees worldwide: 2,336

Total # of full-time company employees in California: 800

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Chaffey Community College District	CCG No.: ET18-0110
Reference No: 17-0241	Page 7 of 9

Company: reRubber, LLC

Address: 315 S. Sultana Ave.

City, State, Zip: Ontario, CA, 91765

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 7

Total # of full-time company employees worldwide: 7

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

Company: Sadaf Foods

Address: 2828 S. Alameda

City, State, Zip: Los Angeles, CA 90058

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 50

Total # of full-time company employees in California: 50

Company: Specialty Minerals Inc.

Address: 6565 Meridian Rd.

City, State, Zip: Lucerne Valley, CA 92356

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 356

Total # of full-time company employees in California: 56

Company: Tovey Schultz

Address: 18261 Collier Ave., Unit A

City, State, Zip: Lake Elsinore, CA 92530

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 25

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

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Chaffey Community College District

CCG No.: ET18-0110

Reference No: 17-0241

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Company: Trek Bicycle Corporation

Address: 5100 Shea Center Dr.

City, State, Zip: Ontario, CA 91761

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 1,900

Total # of full-time company employees in California: 48

Company: Under Armour

Address: 2510 W. Walnut Ave.

City, State, Zip: Rialto, CA 92376

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 9,500

Total # of full-time company employees in California: 484

Company: United Pumping Service, Inc.

Address: 14000 E. Valley Blvd.

City, State, Zip: Industry, CA 91746

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 80

Total # of full-time company employees worldwide: 106

Total # of full-time company employees in California: 106

Company: United Storm Water, Inc.

Address: 14000 E. Valley Blvd.

City, State, Zip: Industry, CA 91746

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 37

Total # of full-time company employees in California: 37

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Chaffey Community College District

CCG No.: ET18-0110

Reference No: 17-0241

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Company: U.S. Borax Inc.

Address: 14486 Borax Rd.

City, State, Zip: Boron, CA 93516

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 40

Total # of full-time company employees worldwide: 750

Total # of full-time company employees in California: 600



**LOCAL 12-49
VICTORVILLE, CA**

March 30, 2017

USW 12-49
PO BOX 217
VICTORVILLE, CA
92393
RE: Training Curriculum

To whom it may concern,

On behalf of Local 12-49 and its members, we fully support and endorse, any training or schooling of our members, together with Cemex. I am writing this letter in strong support for the Grant application submitted by Cemex.

This grant will provide and benefit our members with the evolving technical skills and education to better serve our community, and our environmental and safety needs.

We thank you for your consideration and excited for our members future.

Sincerely,

A handwritten signature in cursive script, appearing to read "Leonard Roldan".

Leonard Roldan
Vice President
Local 12-49



Training Proposal for:
Riviera, Inc. dba The Enterprise U
Agreement Number: ET18-0109

Panel Meeting of: June 23, 2017

ETP Regional Office: North Hollywood

Analyst: E. Wadzinski

PROJECT PROFILE

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

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
\$794,000		\$55,000 8%		\$849,000

In-Kind Contribution:	50% of Total ETP Funding Required	\$1,500,000
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Imp., HazMat, Literacy Skills, Mfg. Skills, Adv. Technology, OSHA 10/30	400	8-200	0	\$1,078	\$16.16
				Weighted Avg: 56			
2	Retrainee	Business Skills, Commercial Skills, Computer Skills, Continuous Imp., HazMat, Literacy Skills, Mfg. Skills, Adv. Technology, OSHA 10/30	200	8-200	0	\$866	\$16.16
				Weighted Avg: 54			
3	Retrainee SB<100 Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Imp., HazMat, Literacy Skills, Mfg. Skills, Adv. Technology, OSHA 10/30	200	8-200	0	\$1,223	\$16.16
				Weighted Avg: 44			

Minimum Wage by County: \$17.63 per hour for Alameda, Contra Costa, Marin, San Francisco, San Mateo and Santa Clara Counties; \$16.96 per hour for Los Angeles County; \$17.22 per hour for Orange County; \$16.72 per hour for San Diego County; \$16.46 per hour for Sacramento and \$16.16 for Alpine and 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

Up to \$5.00 per hour may be used to meet Post-Retention Wage.

Occupation Titles	Wage Range	Estimated # of Trainees
Accounting and Finance	\$20.00 - \$50.00	100
Administration and Operations	\$11.16 - \$41.00	210
Information Technology and Engineering	\$30.00 - \$60.00	100
Managers	\$40.00 - \$70.00	80
Marketing and Sales	\$20.00 - \$50.00	100
Production	\$11.16 - \$41.00	210

INTRODUCTION

Founded in 2001, Riviera, Inc. dba The Enterprise U (The Enterprise U) helps companies, governments, and individuals acquire and sustain a competitive advantage through learning. The Enterprise U provides training services which include custom design course materials, custom in-class exercises and case studies; as well as, consulting, coaching, and software solutions to clients in the industries of manufacturing, entertainment, technology, logistics, and biotechnology.

The Enterprise U (www.theenterpriseU.com) is eligible for ETP funding as a for-profit private training agency. The core participating employers qualify as manufacturers or other companies facing out-of-state competition. All training will be conducted at participating employer worksites. This is Enterprise U's eighth ETP Contract.

PROJECT DETAILS

The Enterprise U is seeking a new contract as the funds for their most recent Agreement will be exhausted by June 2017. Participating employers have expressed a need for training as a result of an ever-changing economy, expressing the need to address continuing pressure from out-of-state competition and struggles to keep up with technology and industry competitors. Companies need to implement new business process improvement initiatives, IT projects, and specific skill-building training to ensure employees can be productive and effective. Many are investing in automated systems and software packages to increase productivity, efficiency, and accuracy within their companies. In addition, some employers are reorganizing operations to meet procurement, development, and technology changes.

Curriculum Development

The Enterprise U's curriculum has been shaped through many years of consultation with participating employers and leading economic development groups. The curriculum courses are customized according to specific business improvement goals and employee skills assessments. The Enterprise U meets with employer representatives and department heads to define goals and devise curriculum topics that address company-specific training objectives. The Enterprise U also relies on feedback from management and frontline workers to measure the effectiveness of training and to help define strategies for prospective skills development opportunities.

Training Plan

Training is designed to help employers maximize productivity and operational efficiency. The Enterprise U will deliver a customized training plan to each participating employer by integrating company-specific examples and exercises, along with real-world problem solving techniques. In addition to the Company specific benefits for training that have been articulated, the proposed training assessments will also promote the retention and expansion of California's manufacturing workforce. The "core" group of employers represents over 100% of requested funding.

Business Skills (54%) – Training will be offered to all trainees. Training in customer service, communication, strategic thinking, negotiation techniques, and presentation skills will teach trainees to interact more effectively with internal and external customers and enhance business performance.

Commercial Skills (4%) - Training will be offered to Engineering, Production, Managers and Operations occupations. Trainees will be provided with skills on best practices in facilities management, environmental management, and emergency response.

Computer Skills (15%) – Training will be offered to all occupations. Trainees will learn how to be more proficient with multiple office productivity applications, computer graphics, project applications, and computer troubleshooting.

Continuous Improvement (10%) – Training will be offered to all occupations. Training is designed to enhance teamwork, problem solving, and decision making skills. These modules will provide workers with the skills needed to implement new processes, improve productivity, and become stronger leaders through teambuilding.

Hazardous Materials Skills (1%) – Training will be offered to Engineering, Production, Managers and Operations occupations. Training is targeted to manufacturing companies that have cleanrooms or a lab environment and must maintain a chemical hygiene plan cleaning and handling hazardous materials.

Literacy Skills (1%) – Training will be offered to Production, Administration and Operations Staff. This training is intended to help employers improve written and verbal communication skills for those individuals for whom English is their second language.

Manufacturing Skills (5%) – Training will be offered to Production Staff and Managers. This training is designed to improve production efficiencies, enhance inventory control measures, and reduce waste in the manufacturing process.

Advanced Technology (10%)

Training will be offered to Information Technology (IT) and Engineering Staff. These occupations are responsible for job functions such as designing and maintaining networks, ensuring IT security, programming applications, analyzing complex data, and managing enterprise databases. This training will help IT professionals improve their technical skills with multiple platforms, enable them to effectively troubleshoot network issues, and prepare them to address the specific infrastructure needs of their respective companies.

The Enterprise U reports that the AT courses are far more costly to deliver than less complex, generalized subject matter. The cost for highly skilled, technical trainers is estimated to be approximately \$150.00 per hour. Due to the added costs associated with specialized training on expensive network equipment and sophisticated software, The Enterprise U is requesting increased reimbursement for the AT courses identified in the curriculum. The 1:10 trainer-to-trainee ratio will be maintained for AT training to allow for in-depth coverage of complex course material and personal attention from the instructor.

Certified Safety Training

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

Commitment to Training

ETP funds will not displace the existing financial commitment of training by participating employers. The smaller participating employers have very limited training resources and ETP funding will allow them to offer formal, on-site training to their employees. For the larger employers targeted for this project, most of their existing training resources are utilized to cover basic training,

such as human resource topics, general computer skills, and on-the-job training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

Training Agency Certification

The Enterprise U is eligible as a training agency licensed by the Bureau for Private Postsecondary Education.

Marketing and Support Costs

The Enterprise U's marketing and recruitment efforts include networking with human resource professionals and various training and development entities such as Professionals in Human Resources Association, American Society for Training and Development, and the Society for Human Resources Association. The Enterprise U's outreach activities consist of newsletters, e-mail/online marketing campaigns, and direct contact via telephone. These activities help The Enterprise U keep its program aligned with the needs of its employer community.

The Enterprise U also allocates resources to perform needs assessments, curriculum customization, and return on investment analyses. The Enterprise U is requesting support costs to fund extensive marketing efforts and the recruitment of additional participating employers. Staff believes 8% Support Costs are justified for the reasons set forth above.

Substantial Contribution

The Enterprise U serves large and small companies, some of which may have received training in prior ETP contracts. If a large participating employer (over 100 full-time employees) has received the benefit of training with payment earned in excess of \$250,000 within the past five years, reimbursement for trainees at the same facility will be reduced by 15% to reflect that employer's substantial contribution to the cost of training. Funding for any employer that has previously been assessed a substantial contribution will be reduced by 30%. Small businesses with 100 or fewer full-time employees (Job Number 3) are not subject to this provision.

Tuition Reimbursement

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

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarized performance by Riviera under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET16-0186	\$909,000	10/01/2015-09/30/2017	800	790	720

The Contractor states that 44,526 hours of training have been reported to date for trainees who have completed the minimum number of training hours, for reimbursement of an estimated \$854,460 (94%) of the \$909,000 Agreement amount. At this time, 340 trainees have completed training and retention. The Contractor expects to complete all training by June 2017 to earn 100% of the Agreement amount.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0221	Statewide	09/02/14 – 09/01/16	\$410,600	\$408,310 (99%)
ET13-0357	Statewide	05/01/2013-04/30/2015	\$303,266	\$303,266 (100%)
ET11-0275	Statewide	06/06/11 – 06/05/13	\$398,061	\$388,541 (98%)

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

N/A

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

8–200

Trainees may receive any of the following:

BUSINESS SKILLS

- + Customer Service Skills
- + Accountability, Empowerment, & Delegating
- + Effective Meeting Skills
- + Dynamic Presentation Skills
- + Effective Communication Skills
- + Negotiation Techniques
- + Maximizing Interpersonal Skills
- + Time Management & Managing Productivity
- + Sales & Marketing Performance
- + Relationship Building
- + Strategic Thinking & Planning
- + Creative Thinking & Problem Solving
- + Effective Decision Making
- + Financial Fundamentals
- + Effective Goal-Setting
- + Competitive Product, Market, or Technology Knowledge
- + Project Management
- + Managing Change
- + Performance Management
- + Organizational Development
- + Knowledge Management
- + Focusing, Executing, & Getting Things Done
- + Success in the Workplace
- + Creating a Continuous Learning Culture
- + Creating a Culture of Innovation
- + Business Analysis & Critical Thinking
- + Appreciating Our Differences
- + Succession Planning

COMMERCIAL SKILLS

- + Facilities Management
- + Environmental Management
- + Emergency Response

COMPUTER SKILLS**Desktop and Cloud Applications**

- + Office Productivity Applications – (Intermediate and Advanced Level Microsoft Office Suite, Lotus Notes, and Google)
- + Computer Graphics
- + Operating Systems
- + Project Applications
- + System, Web and Mobile Tools
- + Working in the Cloud

Accounting

- + Accounting Theory
- + Accounting Applications
- + Accounting Practices

PC Troubleshooting, Maintenance, and Repair

- + Electronics Theory
- + Devices
- + Diagnosing Problems
- + Maintaining Your Equipment and Finding Service

CONTINUOUS IMPROVEMENT

- + Levels of Performance
- + Performance Management
- + Change Management
- + Process Management
- + Total Quality Management
- + Process Mapping
- + Quality Assurance
- + Six Sigma Concepts
- + Lean Concepts
- + Statistical Process Engineering

Team Building

- + Team Building, Dynamics, & Leadership
- + Leadership Skills
- + Employee Engagement
- + Motivating Others
- + Recognizing Performance
- + Coaching
- + Setting Expectations & Giving Feedback
- + Building Successful Teams

HAZARDOUS MATERIALS

- + Hazardous Materials Handling & Cleaning

LITERACY SKILLS**Vocational English & Math**

- + Reading and Writing Business Documents
- + Business English
- + Business Math

Literacy Training must be job related and cannot exceed 45% of total training hours per-trainee.

MANUFACTURING SKILLS

- + Production Operations
 - Fluid Mechanics
 - Machine Shop Basics
 - Motor Controls
 - Power Transmission
- + Inventory Control

- ✚ Warehousing & Distribution
- ✚ Blueprint Reading

Safety Training will be limited to 10% of a trainees total training hours (excluding OSHA 10/30).

ADVANCED TECHNOLOGY

Software Engineering

- ✚ Programming in Visual Basic
- ✚ Programming in C
- ✚ Programming in C++
- ✚ Programming in C# and .NET
- ✚ Programming in Java
- ✚ Programming in SQL
- ✚ Software Lifestyle Methodologies

Database Engineering

- ✚ Oracle Databases
- ✚ SQL Databases
- ✚ DB2 Databases

Software Platforms

- ✚ Oracle/PeopleSoft Software Platform
- ✚ SAP Software Platform
- ✚ IBM/Lotus Software Platform

Business Intelligence

- ✚ Reporting and Analyzing Data Using Statistics and Metrics
- ✚ Scorecarding with Key Performance Indicators and Strategic Objectives

Web

- ✚ HTML
- ✚ Ruby and Ruby on Rails
- ✚ Dreamweaver
- ✚ Flash
- ✚ ColdFusion
- ✚ JavaScript
- ✚ CSS
- ✚ SharePoint
- ✚ XML/XST
- ✚ Service Oriented Architecture, REST APIs
- ✚ Python/Django
- ✚ PHP
- ✚ ASP.NET

Computer Graphics, Digital Media & Modeling

- ✚ Animation Techniques
- ✚ Physics and Art Topics
- ✚ Adobe (Photoshop, Illustrator, InDesign)
- ✚ Computer-Aided Drafting/Manufacturing/Engineering
- ✚ Revit
- ✚ SketchUp
- ✚ SolidWorks

Network Engineering

- ✚ Electronics Overview
- ✚ Microsoft Technology in Networking
- ✚ Cisco Technology in Networking

Operating Systems

- ✚ Windows Operating System in the Network
- ✚ Novell Operating System in the Network
- ✚ UNIX Operating System in the Network

Security Issues

- ✚ Network Security Essentials, Key Principles and Concepts
- ✚ Risk Assessment and Auditing
- ✚ Security Incident Handling
- ✚ Securing Business Applications
- ✚ Web Security

OSHA 10/30 (OSHA certified instructor)

- ✚ OSHA 10 (requires completion of the full 10-hour course)
- ✚ OSHA 30 (requires completion of the full 30-hour course)

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

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Riviera, Inc. dba The Enterprise U

CCG No.: ET18-0109

Reference No: 17-0187

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: 3E Company

Address: 3207 Grey Hawk Ct., Suite 200

City, State, Zip: Carlsbad, CA 92010

Collective Bargaining Agreement(s): None

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

Total # of full-time company employees worldwide: 361

Total # of full-time company employees in California: 153

Company: American Technologies, Inc.

Address: 210 W Baywood Ave.

City, State, Zip: Orange, CA 92865

Collective Bargaining Agreement(s): None

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

Total # of full-time company employees worldwide: 908

Total # of full-time company employees in California: 592

Company: BlackLine Systems

Address: 21300 Victory Blvd., 12th Floor

City, State, Zip: Woodland Hills, CA 91367

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 200

Total # of full-time company employees worldwide: 630

Total # of full-time company employees in California: 340

Company: Honeybee Foods

Address: 16125 Valley Blvd.

City, State, Zip: City of Industry, CA 91744

Collective Bargaining Agreement(s): None

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

Total # of full-time company employees worldwide: 624

Total # of full-time company employees in California: 435

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Riviera, Inc. dba The Enterprise U

CCG No.: ET18-0109

Reference No: 17-0187

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Company: Leo A Daly

Address: 550 South Hope St., 27th Floor

City, State, Zip: Los Angeles, CA 90071

Collective Bargaining Agreement(s): None

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

Total # of full-time company employees worldwide: 740

Total # of full-time company employees in California: 35

Company: Lowney Architecture

Address: 360 Seventeenth St., Suite 200

City, State, Zip: Oakland, CA 94612

Collective Bargaining Agreement(s): None

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

Total # of full-time company employees worldwide: 27

Total # of full-time company employees in California: 27

Company: Lucky Brand Dungarees

Address: 540 South Santa Fe Ave.

City, State, Zip: Los Angeles, CA 90013

Collective Bargaining Agreement(s): None

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

Total # of full-time company employees worldwide: 3630

Total # of full-time company employees in California: 700

Company: Microfabrica

Address: 7911 Haskell Ave.

City, State, Zip: Van Nuys, CA 91406

Collective Bargaining Agreement(s): None

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

Total # of full-time company employees worldwide: 95

Total # of full-time company employees in California: 95

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Riviera, Inc. dba The Enterprise U

CCG No.: ET18-0109

Reference No: 17-0187

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Company: NDS

Address: 21300 Victory Blvd., Suite 215

City, State, Zip: Woodland Hills, CA 91367

Collective Bargaining Agreement(s): None

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

Total # of full-time company employees worldwide: 463

Total # of full-time company employees in California: 415

Company: Panasonic Appliances Refrigeration System Corporation of North America

Address: 2055 Sanyo Ave.

City, State, Zip: San Diego, CA 92154

Collective Bargaining Agreement(s): None

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

Total # of full-time company employees worldwide: 300,000

Total # of full-time company employees in California: 70

Company: SPTS Technologies

Address: 2381 Bering Dr.

City, State, Zip: San Jose, CA 95131

Collective Bargaining Agreement(s): None

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

Total # of full-time company employees worldwide: 500

Total # of full-time company employees in California: 53

Company: Staar Surgical

Address: 1911 Walker Ave.

City, State, Zip: Monrovia, CA 91016

Collective Bargaining Agreement(s): None

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

Total # of full-time company employees worldwide: 350

Total # of full-time company employees in California: 210



Training Proposal for:
**Southern California Sheet Metal Joint Apprenticeship and
 Training Committee**

Agreement Number: ET18-0902

Panel Meeting of: June 23, 2017

ETP Regional Office: North Hollywood

Analyst: M. Webb

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate Apprenticeship	Industry Sector(s):	Construction Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles, Orange, San Bernardino, Riverside, Inyo, Mono, Kern	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No International Association of Sheet Metal, Air, Rail and Transportation Workers, Local 105		
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		≤0%	

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
\$888,120		\$61,570 8%		\$949,690

In-Kind Contribution:	50% of Total ETP Funding Required	Inherent
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Apprentice	Commercial Skills, OSHA 10/30	405	8-200	0	\$2,002	\$22.04
				Weighted Avg: 144			
2	Retrainee Apprentice Veteran	Commercial Skills, OSHA 10/30	25	8-200	0	\$2,002	\$22.04
				Weighted Avg: 144			
3	Retrainee Journeyman	Commercial Skills, Computer Skills, OSHA 10/30	126	8-200	0	\$705	\$41.86
				Weighted Avg: 30			

Minimum Wage by County: \$22.04 per hour Statewide (Priority Industry).

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

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

Up to \$5.30 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation

Occupation Titles	Wage Range	Estimated # of Trainees
JOB NUMBER 1		
Apprentice Sheet Metal Worker	\$16.74-\$36.00	405
JOB NUMBER 2 (Veterans)		
Apprentice Sheet Metal Worker	\$16.74-\$36.00	25
JOB NUMBER 3		
Journeymen Sheet Metal Worker	\$41.86	120

INTRODUCTION

Formed in 2003, the Southern California Sheet Metal Joint Apprenticeship and Training Committee Training Center (SoCal Sheet Metal JATC) provides training for Apprentice and Journey sheet metal workers for seven Southern California counties. In the past, two different apprenticeship committees served the Southern California Region (Sheet Metal Workers International Association, Local 105 JATC and Air Conditioning Sheet Metal Association, Orange Empire JATC). After 2007, these committees were consolidated into one. Signatory employers are represented on the Committee through the Sheet Metal and Air Conditioning Contractors National Association (SMACNA) and Sheet Metal, Air, Rail, Train International Association (SMART). This will be the fifth ETP Agreement with SoCal Sheet metal JATC.

The center currently serves 650 Apprentices and approximately 3,000 Journeymen. The five-year Apprentice training program provides Commercial Skills training in refrigeration, fabrication, sheet metal, and HVAC systems. Upon completion, trainees will have the skills required to design, install, and provide services for commercial and residential customers.

Under these circumstances, when a joint trust is serving a large number of Apprentices over a broad geographic region, ETP has recognized that the cap on apprenticeship funding may be overly restrictive. Staff recommends a total of \$885,400 for Apprentice and Journeymen training. This amount is below the cap and reflects the fact that the joint trust resulted from a merger of two program sponsors. The active contract is funded under Fiscal Year (FY) 2016/17. If approved, this proposal will be funded in FY 2017/18 (one contract per FY).

PROJECT DETAILS

Substantial growth in the construction industry has created more demand for skilled sheet metal workers. The need for apprentices in this field is expected to double in 2017-2018. Employers also need workers with knowledge and experience in energy efficiency, green technology, climate change, and computer capabilities such as AutoCAD. New building codes have tightened energy efficiency standards of sheet metal work. SoCal Sheet Metal JATC has developed a training plan that will provide training on new energy control systems for both Apprentices and Journeymen upgrade.

The California Building Energy Efficiency Standards, also known as Title 24, require higher levels of efficiency for air conditioning and refrigeration systems, including new types of equipment and controls. Trainees will also learn about additional and AB 32, which requires the State of California to reduce greenhouse gas emissions by 2020.

Training Plan

Training is scheduled to begin July 1, 2017. Curriculum topics are developed by the sheet metal industry and include national and local input. Union representatives and joint committee members have approved use of the training topics included in the training program.

Commercial Skills (80%) Training will be offered to all occupations to increase skill sets and improve capabilities to complete all job tasks associated with the sheet metal industry. Trainees will learn to utilize metal to construct objects such as airplane wings, tubing, car bodies, ductwork, and storage and refrigeration units. Trainees will perform installation, maintenance, testing, adjusting, balancing, and energy management. Additionally, training in project management, layout development, specifications, testing and balancing, and computerized controls will ensure workers have the skills and experience to execute job duties competently.

Computer Skills (10%): Training will be offered to all occupations to learn new skills using computer-aided drafting tools to produce two and three-dimensional drawings. Topics will include AutoCAD, Detailing using CAD, and Navisworks virtual construction modeling.

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

Apprenticeship Program

The Panel is authorized to fund Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). ETP funding is designed to supplement cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship

training. Depending on the type of trade, apprenticeship programs vary in length. In this case the program is five years.

For the building trades, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by \$5, reducing the priority industry rate from \$18 to \$13 per hour. In addition, the Panel adopted a "blended rate" for Journeymen, reflecting the fact that they may be employed by a variety of contractors over the two-year term of contract ranging from large employers, to small (≤ 100 employees). This is \$22 per hour, midway between the Priority Industry standard rate (\$18) and Small Business rate (\$26).

The ETP wage for Apprentices is no less than \$22.04 per hour, tracking the Special Employment Training wage as modified for priority industries. However, the actual wages paid are shown in the Training Plan Table and contract when they exceed \$22.04, for both Apprentices and Journeymen.

Veterans

SoCal Sheet Metal has committed to training 25 Veterans (Job Number 2-Apprentice). The JATC works with Helmets-to-Hardhats, and other Veterans programs for recruitment.

Commitment to Training

Employers will continue to make contributions to the training trust for every hour worked by apprentices. Safety training is, and will continue to be, provided by the JATC in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

Administration of this Agreement will be performed in a partnership among SoCal Sheet Metal JATC the two administrative vendors, the Los Angeles Unified School District and Steve Duscha Adversaries. The JATC has assigned five staff responsible for scheduling training sessions and collecting all training documentation. Both administrative vendors will assist as the employer liaison with uploading training and enrollment data, providing ETP reporting, and all other related activities over the contract term date.

Learning Management System

Staff has approved the use of a Learning Management System for recordkeeping.

Marketing and Support Costs

Signatory employers are notified of training offered through the union through associations, mailings, presentations, and internet postings. At the conclusion of each course session, SoCal Sheet Metal JATC conducts assessments to gain feedback and determine overall effectiveness of the training program. Joint labor-management committee members also review and update the curriculum, training materials, and training facilities to ensure the course topics are in line with the International Training Institute for the Sheet Metal and Air Conditioning Industry. The JATC requests and staff recommends 8% support costs to continue marketing efforts and employer recruitment for the duration of the contract.

Trainer Qualifications/Coordinator

Experienced journey-level workers in the sheet metal trade will provide all training under this Agreement. All trainers are employed by SoCal Sheet Metal JATC and have the knowledge and skills required to deliver sheet metal training topics.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by SoCal Sheet Metal JATC under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET16-0923	\$885,400	05/27/16-05/26/18	470	431	188

Based on ETP Systems, 47,463 reimbursable hours have been tracked for potential earnings of \$634,956 (71% of approved amount). Final billing for all trainees will take place once all eligible trainees have completed retention requirements. The Contractor projects final earnings of 100% based on committed training through July/August 2017.

PRIOR PROJECTS

The following table summarizes performance by SoCal Sheet Metal JATC under ETP Agreements that were completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0925	City of Industry	04/01/15-03/31/17	\$448,448	\$448,448 (100%)
ET14-0906	City of Industry	11/16/13-11/15/15	\$448,448	\$448,448 (100%)
ET13-0911	City of Industry	10/22/12-10/21/14	\$298,936	\$298,936 (100%)

DEVELOPMENT SERVICES

Steve Duscha Advisories in Sacramento assisted with development of this proposal for a flat fee of \$10,000.

ADMINISTRATIVE SERVICES

Steve Duscha Advisories and the Los Angeles Unified School District in Los Angeles will perform administrative services for a total combined fee not to exceed 13% of payment earned.

TRAINING VENDORS

N/A

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

8-200

Trainees may receive any of the following:

Curriculum Job Numbers 1 and 2 Apprentices**COMMERCIAL SKILLS****Course Two** (course one is for first year apprentices and is not included in the ETP curriculum)**A. INTRODUCTION**

Know the trends and future of the sheet metal trade

- Review class expectations
- Review class rules
- Discuss the current state of the sheet metal trade
- Discuss the different types of apprenticeship organizations
- Discuss the industry standards for employment
- Discuss wage scales for the trade
- Discuss the importance of organization and time management
- Discuss the procedures for equipment care
- Discuss the role of computers in the sheet metal trade

B. WORKPLACE SAFETY

Learn workplace safety rules and procedures

- Identify the standard shop procedures
- Discuss shop safety rules and regulations
- Discuss procedures for the safe handling of asbestos
- Discuss shop safety as it applies to the use of tools and equipment
- Demonstrate the ability to use tools and equipment safely
- Discuss safety practices in field installations
- Discuss shop procedures for fire and earthquake safety
- Pass the safety test with 100% accuracy

C. TRADE MATHEMATICS – PART 2

Understand the steps in solving various trade mathematical problems.

- Describe how mathematics is used in the sheet metal trade
- Demonstrate the ability to use a calculator
- Solve various decimal and fractional problems using a calculator
- Demonstrate the ability to solve equations
- Describe how trigonometry is used in the sheet metal trade
- Solve various trigonometric problems

D. DRAFTING AND SKETCHING – PART 2

Know how to draw and interpret basic sheet metal drawings and sketches

- Review fundamentals of drafting and sketching
- Describe a pictorial drawing
- Draw square and rectangular fittings
- Sketch moldings
- Draw ellipses
- Lay out and draw an octagon
- Interpret shop sketches and drawings
- Demonstrate the ability to sketch free hand

E. LAYOUT AND PATTERN DEVELOPMENT – PART 2

Learn how to lay out patterns for the fabrication of ducts

- Describe off-center round tees
- Lay out a round elbow
- Describe radial lines
- Fabricate a roof jack
- Fabricate offset round tapered ducts using triangulation
- Layout and fabricate a transition
- Describe a duct change elbow
- Demonstrate the ability to lay out change and drop “S” offsets
- Explain applicable formulas for fabrication of ducts

F. READING PLANS AND SPECIFICATIONS – PART 1

Understand the basics of reading and interpreting symbols, specifications, and plans

- Discuss the importance of specifications
- Identify the symbols commonly used in plan reading
- Identify the abbreviations commonly used in plan reading
- Identify the different details commonly used in plan reading
- Identify the different parts of a set of plans
- Interpret a set of plans

G. MATERIALS – PART 2

Know the sources, types, and methods used for the materials in sheet metal work

- Review the sources and uses of steel
- Review the different types of sheet metal
- Review the U.S. standard gauges of sheet metal
- Review the different metal products used in sheet metal work
- Demonstrate the ability to use various sheet metal fasteners
- Describe various forming methods used in sheet metal work
- Differentiate among various types of sheet metal

H. INDUSTRIAL SPECIALTIES – PART 2

Learn the different materials and special handling systems used in the sheet metal trade

- Differentiate among various materials used in sheet metal work
- List various material handling systems
- Analyze various material handling systems

I. SHOP WORK – PART 2

Understand the fabrication of sheet metal projects to predetermined specifications

- Review basic shop fabrication procedures
- Discuss use of the standard sheet metal hand bending hand brake
- Demonstrate use of box and pan brakes
- Describe use of the rotary combination machines
- Demonstrate the ability to use squaring and throatless shears
- Demonstrate the use of bar folders and slip rollers
- Describe how to fabricate a round tee

J. FIELD INSTALLATION – PART 2

Know the installation techniques for fabricated products in “on-the-job” situations

- Review the basics of field installation
- Describe various duct clearances in field installation
- Describe the placement of hangers
- Demonstrate duct preparation
- Describe duct erection
- Know how to evaluate a job upon completion

K. SERVICE WORK – PART 2

Learn to deliver effective service work through accurate evaluation

- Evaluate a typical work order and job layout
- Describe heating, ventilation, and air conditioning control systems
- Describe servicing of heating, ventilation, and air conditioning systems
- Evaluate materials used in servicing
- Interpret job specifications for servicing
- Evaluate control systems on furnaces
- Evaluate control systems on air conditioning units

L. ARCHITECTURAL SHEET METAL – PART 2

Understand the function of a structure and the overall relationship of sheet metal to architectural design

- Describe various architectural sheet metal materials
- Describe the differences in architectural sheet metal seams
- Describe the installation of gutters and conductor pipe
- Discuss the use of flashing and cornices
- Discuss the evaluation procedures for sheet metal siding, roofing, and decking
- Discuss the evaluation procedures of the different types of ventilators

M. HEATING, VENTILATION, AND AIR CONDITIONING (HVAC) SYSTEMS – PART 2

Know the specific features and functions of the heating, ventilation, and air conditioning systems

- Describe air movement in ducts
- Differentiate among various duct types
- Describe the operation of central heating, ventilation, and air conditioning systems
- Discuss different duct systems

N. TESTING AND BALANCING – PART 1

Learn testing and balancing of heating, ventilation, and air conditioning systems

- Describe normal design conditions for summer and winter
- Discuss basics of testing and balancing
- Demonstrate how to test and balance a system

O. ENERGY CONSERVATION

Understand the principle of energy conservation.

- Define *energy management*
- Discuss the economic impact of energy management on a business organization
- Discuss the environmental impact of energy management on a business organization
- Describe typical ways in which energy is wasted
- Describe typical ways in which energy is saved

Course 3**A. WORKPLACE SAFETY**

Know the welding safety rules and procedures as they pertain to the sheet metal trades

- Discuss shop safety rules and regulations
- Discuss shop procedures for fire and earthquake safety
- Discuss shop safety as it applies to the use of tools and equipment
- Use tools and equipment safely
- Pass the designated safety exam with 100% accuracy

B. WELDING METALLURGY

Learn and interpret types of steel and properties of metal

- Describe types of steel and their manufacturing processes
- Identify properties of metal
- Identify laws of expansion, contraction, and distortion
- Describe filler materials

- Explain reason for preheating and post-heating
- Describe methods and processes of welding the following: carbon steel, alloy steel

C. WELDING EQUIPMENT AND PROCESSES S

Understand the processes involved in using the following equipment

- Describe the processes involved in using the oxy-acetylene welding apparatus
- Describe the processes involved in using the arc welding machine
- Describe the processes involved in using the TIG welding machine
- Describe the processes involved in using the MIG welding machine
- Describe the processes involved in using the gas metal arc welder

D. WELDING TOOLS AND EQUIPMENT

Know the proper use of shop equipment

Define regulations in the welding field

- Describe the use and efficiency of the various types of AC and DC power supplies
- Classify the various types of electrodes
- Identify the types of gases according to the following: cylinder identifications, use on specific metals, use on specific jobs
- Identify the types of torches and tips
- Perform inspection and maintenance procedures

E. WELDING SYMBOLS AND NOMENCLATURE

Learn the symbols and nomenclature commonly used in welding

- Describe standard welding symbols
- Describe nomenclature for the welding trade

F. SURFACE WELDS

Understand the application of surface welds

- Weld fusion beads with and without filler metal
- Perform butt welds with filler metal
- Perform fillet welds in lap and tee joints
- Demonstrate corner welds with and without filler metal

G. FILLET WELDS: ALL POSITIONS

Know all positions of fillet welds

- Apply torch manipulation techniques
- Inspect metal for weld defects
- Perform welding sequences
- Compute measurements
- Perform welds for joint design
- Demonstrate welds for pipe-to-plate
- Demonstrate fillet soundness

H. GROOVE WELDS

Learn the different types of groove welds.

- Identify the various types of groove welds
- Perform the following types of groove welds: corner, single vee with back up, single vee open, single level with back up, single level open, double vee and double level, pipe 2-G, 5-G, and 6-G

I. OXYACETYLENE CUTTING (BURNING)

Understand the principles and procedures in oxyacetylene cutting

- Describe principles of oxyacetylene cutting
- Describe characteristics of acetylene
- Describe characteristics of oxygen
- Demonstrate proper care of cylinders and regulators

- Identify oxyacetylene cutting equipment
- Assemble oxyacetylene cutting equipment
- Know how to correctly and safely adjust oxyacetylene cutting equipment
- Demonstrate correct tip cleaning procedures
- Perform flame adjustment for cutting
- Demonstrate skill in the following: a. burning slits b. scarfing c. piercing holes
- Demonstrate free-hand cutting
- Know how to set up and use a radiograph (sidecutter)
- Demonstrate beveling a 30-degree bevel on 3/8 inch plate
- Demonstrate beveling a 22 1/2-degree bevel on 1-inch plate
- Demonstrate proper use of scarfing tips
- Identify various fuel gases

J. AIR CARBON ARC PROCESS

Know the air carbon arc process

- Describe procedures and safety precautions
- Identify air supply
- Identify use of arc electrode holder
- Identify electrodes used
- Describe and use air carbon arc (AAC) cutting equipment
- Describe and use carbon electrode arc (CAC) cutting equipment
- Perform oxygen arc cutting
- Perform metal electrode arc cutting
- Perform air metallic arc cutting

K. BRAZING STEEL AND CAST IRON

Learn brazing on various surfaces

- Braze the following joints: sheet metal, butt, lap, tee
- Perform brazing on tubing in the following positions: butt, horizontal, vertical, overhead
- Demonstrate cast iron vee groove brazing
- Perform brazing on tubing tee joints in all positions

L. WELDING EVALUATION

Understand the competencies needed to pass the City of Los Angeles Departmental Welding Exam

- Answer and interpret correctly items on the written examinations
- Participate in manipulative skills tests
- Cooperate in observations and critiques
- Participate in classroom activities
- Prepare for the City of Los Angeles Departmental Exam

M. READING PLANS AND SPECIFICATIONS – PART 2

Know the proper ways to read and interpret architectural and structural drawings, and to draw mechanical and electrical plans

- Review the importance of specifications
- Review the symbols commonly used in plan reading
- Review the abbreviations commonly used in plan reading
- Review the different details commonly used in plan reading
- Review the different parts of a set of plans
- Interpret a set of plans
- Interpret architectural drawings
- Interpret structural drawings
- Draw mechanical drawings
- Draw electrical drawings

Course 4**A. INTRODUCTION**

Review the trends and future of the sheet metal trade

- Review class expectations
- Review class rules
- Review the standard shop procedures
- Review the importance of craftsmanship
- Review the history of apprenticeship programs
- Review the history of sheet metal
- Review the possible future uses for sheet metal
- Review mathematical computations relevant to the sheet metal trade
- Solve various practical math problems

B. WORKPLACE SAFETY REVIEW

Review workplace safety rules and procedures

- Review shop safety rules and regulations
- Review shop procedures for fire and earthquake safety
- Review shop safety as it applies to the use of tools and equipment
- Use tools and equipment safely
- Pass the designated safety exam with 100% accuracy

C. DRAFTING AND SKETCHING – PART 3

Learn the basics of drafting and sketching installation plans for heating and air conditioning systems

- Review fundamentals of drafting and sketching
- Interpret basic sheet metal drawings
- Identify symbols and abbreviations used in heating and air conditioning plans
- Draw installation plans for a heating and air conditioning system

D. LAYOUT AND PATTERN DEVELOPMENT – PART 3

Know how to layout pattern for individual fittings

- Review the principles of pattern development
- Discuss the use of off-center tapers in metal fabrication
- Discuss the fabrication of various types of miters
- Identify round tapers on a pitch
- Discuss the use of round tapers on a pitch
- Identify a square to round transition on a pitch
- Discuss the use of a two-way switch

E. READING PLANS AND SPECIFICATIONS – PART 3

Learn the accurate reading and interpretation of architectural and structural drawings, and practice drawing mechanical and electrical plans

- Review the importance of specifications
- Review the proper way of interpreting architectural drawings
- Review the proper ways of interpreting structural drawings
- Draw several mechanical drawings
- Draw several electrical drawings

F. MATERIALS – PART 3

Learn the characteristics and functions of stainless steel, aluminum, copper, and other forms of sheet metal

- Discuss the characteristics of stainless steel used in sheet metal work
- Discuss characteristics of aluminum used in sheet metal work
- Discuss the characteristics of copper used in metal sheet work
- Differentiate the uses of stainless steel, aluminum, and copper in sheet metal work

G. INDUSTRIAL SPECIALTIES – PART 3

Understand the various types and applications of industrial specialties in the sheet metal trade

- Describe lagging
- List examples of where lagging is used
- Describe various materials used in pipe lagging
- Describe the use of polyvinyl chloride (PVC) in sheet metal work
- Work with PVC
- Describe the use of fibrous glass duct board
- Work with fibrous glass duct board
- Describe the use of fiber-reinforced plastic
- Work with fiber-reinforced plastic

H. SHOP WORK – PART 3

Understand the functions and operation of special sheet metal power equipment

- Review basic shop fabrication procedures
- Operate power-squaring shears
- Operate a press brake
- Operate roll-forming machines

I. HEATING, VENTILATION, AND AIR CONDITIONING SYSTEMS – PART 3

Know the processes, units, and devices used to condition the air

- Describe air movement in ducts
- Differentiate among installation of different types of package units
- Evaluate the different types of terminal devices
- Discuss the different types of generators and motors used in heating and air conditioning systems

J. FIELD INSTALLATION – PART 3

Understand the installation techniques for the HVAC systems

- Differentiate between a smoke damper and a fire damper
- Analyze various installations of central heating and air conditioning systems
- Discuss advantages of roof top package unit installations

K. SERVICE WORK – PART 3

Understand the start-up, testing, and balancing processes for residential and light commercial heating and air conditioning systems

- Describe the start-up process for residential and light commercial heating and air conditioning systems
- Prepare components for testing and balancing
- Describe instruments used in balancing a system
- Test and balance a heating and air conditioning system

L. ARCHITECTURAL SHEET METAL – PART 3

Understand the installation techniques for batten seam roofs, coping, fascia, gravel stops, flashing, and counter-flashing, and the fabrication of cornices and louvers

- Install batten seam roofs
- Install coping, fascia, and gravel stops
- Install flashing and counter-flashing
- Discuss fabrication of cornices
- Fabricate and install louvers

M. ELECTRONIC AND COMPUTERIZED CONTROLS – PART 1

Understand the basic principles and functions of electronic components and controls in heating, ventilation, and air conditioning systems

- Define *electricity*
- Define *current*
- Define *conductor*
- Define *resistance*
- Define *voltage*
- Solve Ohm's Law problems
- Compare alternating current (AC) to direct current (DC)
- Identify electrical circuits and their components
- Describe magnetism
- Describe how electricity can be generated
- Describe the function of fuses and circuit breakers
- Describe the action of the following electromechanical devices: fans, motors, monitors, controls
- Describe basic controls used in heating and air conditioning systems
- Describe the use of pneumatic controls in heating and air conditioning systems

N. BLOWPIPE SYSTEM – PART 1

Know the basics of blowpipe construction and special fittings

- Describe a complete blowpipe system
- Describe a closed system
- Describe a heat recovery system
- Describe a cyclone material separator
- Describe how various parts of a system contribute to the total operation
- Describe a baghouse
- Explain how a baghouse works

O. FOOD SERVICE AND BEVERAGE DISPENSING EQUIPMENT – PART 1

Learn how sheet metals are used in food service and dispensing equipment

- Describe food service equipment that uses sheet metal
- Describe various jobs a sheet metal worker might encounter in servicing food service equipment
- Differentiate among food service sheet metal work and other types of sheet metal work

P. ASBESTOS

Know about asbestos and its health hazards.

- Describe places asbestos might be found at a work site
- Discuss how to identify asbestos
- Describe the hazards of working with asbestos
- Describe how to handle asbestos when found in retrofit work

Course 5**A. PROFESSIONAL GROWTH**

Know the importance of professional growth

- Explain the necessity to continue learning about the trade
- List several ways to continue learning about the trade

B. ADVANCED TRADE MATHEMATICS

Learn the uses of advanced mathematics in the sheet metal trade.

- Use trigonometry and other areas of mathematics to solve practical trade problems
- Explain how to break down difficult problems into small steps
- Use all the features of THE International Training Institute (ITI) calculator

C. DRAFTING AND SKETCHING – PART 4

Understand drafting, sketching, and the computer-assisted drafting (CAD) system

- Use applied shop drawing skills to make a simple shop drawing
- Explain the uses and advantages of a CAD system
- Describe the basic elements of CAD system
- Perform field measurements of ducts and fittings

D. LAYOUT AND PATTERN DEVELOPMENT – PART 4

Know how to solve lay out and pattern development problems

- Review the principles of pattern development
- Review the use of off-center tapers in metal fabrication
- Review the fabrication of various types of miters
- Review the use of round tapers on a pitch
- Review the use of a two-way switch
- Solve practical problems in layout
- Explain the processes in mathematical layout
- Summarize the principles of pattern drafting

E. READING PLANS AND SPECIFICATIONS – PART 4

Learn how to make shop tickets and cut lists from shop drawings

- Discuss the value of making shop tickets and cut lists
- Make a shop ticket from a drawing of a duct run
- Use the shop ticket to construct each piece of duct needed in the duct run

F. INDUSTRIAL SPECIALTIES – PART 4

Understand the types, applications, and installation of heavy gauge metals and other industrial specialties

- Explain why working with heavy gauge metal requires different skills than working with light gauge metal
- Calculate stretch-out for sixteen gauge and heavier metal
- Lay out the bend lines of heavy metals to properly account for metal thicknesses
- Calculate stretch-out for cylinders
- Evaluate and choose proper vee die sizes
- Describe the basic procedures for building a sign
- Explain the various components of blowpipe construction
- Identify and illustrate special blowpipe fittings
- Explain how special fittings are used
- Describe boiler breeching
- Explain how to install boiler breeching

G. SHOP WORK – PART 4

Know the functions of special sheet metal power equipment

- Discuss and demonstrate the use of coil line systems
- Discuss the features and function of a cleat bender
- Demonstrate the use of a cleat bender
- Discuss the features and function of a pin spotter
- Demonstrate the use of a spin spotter
- Discuss the features and function of a shopmaster machine
- Demonstrate the use of a shopmaster machine

H. HEATING, VENTILATION, AND AIR CONDITIONING (HVAC) SYSTEMS – PART 4

Learn the principles, processes, units, and functions of devices used for conditioning the air

- List the basic properties of air
- Describe the following for a given air condition: psychometric temperature, dry bulb temperature, relative humidity, dew point
- Describe the refrigeration cycle
- List the basic components of a refrigeration unit
- Describe the function of each unit
- Describe the difference between six different types of fan
- Use fan laws when making changes in a fan system
- Describe positive and negative pressures in a building or room
- Describe the basic operation of an economizer cycle
- Explain why heat loads are calculated
- List the three main sources of heat loss
- List the most common method of sizing duct
- Explain the importance of indoor air quality

I. TESTING AND BALANCING – PART 2

Understand the proportionate method of testing and balancing a system

- List three advantages of the proportionate method of testing and balancing
- List five main steps used to balance simple duct systems
- Explain why different fan wheels are required for positive and negative systems

J. ARCHITECTURAL SHEET METAL – PART 4

Know the construction of metal buildings, skylights, and curtain walls

- Describe different types of metal ceilings
- Demonstrate how to install metal ceilings
- Discuss installation of specialty items
- Demonstrate how to install roof panels
- Demonstrate how to install flashing, counter flashing, gravel stop and coping
- List the advantages of metal buildings over other types of buildings
- Identify two types of roof used on metal buildings
- Identify two types of skin used on metal buildings
- Identify components commonly used in metal buildings
- Describe the steps for installing a skylight
- Explain the difference between the two types of curtain wall

K. ELECTRONIC AND COMPUTERIZED CONTROLS – PART 2

Learn the functions and operation of electronic and computerized controls

- Describe the operation of electronic control systems
- List the four main advantages of electronic control systems over conventional systems
- Explain specific electronic control system components
- Define a computerized control system
- List five main advantages of computerized control systems over conventional systems
- Explain the purpose of an energy management system (EMS)
- Distinguish between three levels of EMS systems
- Discuss how to avoid damage from static electricity
- List four things to avoid in the location of control components

L. FOOD SERVICE AND BEVERAGE DISPENSING EQUIPMENT – PART 2

Understand the fabrication and installation of food service and dispensing equipment.

- Discuss why fabricating food service and beverage dispensing equipment requires a high degree of craftsmanship
- List the different materials used in fabricating and installing food service and beverage dispensing equipment

- Describe some of the special techniques in laying out patterns on stainless steel
- Describe how patterns for stainless steel food service equipment are notched and formed
- Describe the general process of assembling and welding food service equipment fixtures
- Describe the responsibilities of the sheet metal worker who is in charge of installing food service equipment

M. SUPERVISORY TRAINING

Know the expectations and requirements for a supervisor.

Describe the responsibilities of a supervisor.

- List six qualities needed to make a good supervisor.
- Compare the advantages and disadvantages of supervision.
- Explain the importance of organizing work.
- Distinguish between different levels of supervision.
- Explain how supervisors should deal with personnel problems.
- List problem solving techniques.
- Learn how to control employee drug and alcohol abuse on the job.

OSHA (OSHA-certified instructor)

- OSHA 10 (requires completion of full 10-hour course)
- OSHA 30 (requires completion of full 30-hour course)

Curriculum Job Number 3 Journey Level Workers**Class Lab Hours**

8-200 Trainees may receive any of the following:

COMMERCIAL SKILLS

- Acceptance test technician
- Aerial high lift operation
- Architectural field installation
- Blueprint reading
- Board and field detailing
- Duct leakage testing
- Fall protection
- Foreman training
- Forklift operation
- Hilti Certification
- HVAC fire life safety supervisor
- HVAC fire life safety technician
- HVAC service
- Powered Industrial Truck
- Project management
- Rigging
- Scaffold safety
- Test and balance for HVAC systems
- Trimble layout system
- Use of Trimble hanger and opening layout device
- Welding

COMPUTER SKILLS

- Advanced AutoCAD
- AutoCAD Basic
- AutoCAD Detailing
- AutoCAD Intermediate
- Basic computers
- Detailing using CAD
- Navisworks virtual construction modeling

OSHA (OSHA-certified instructor)

- OSHA 10 (requires completion of full 10-hour course)
- OSHA 30 (requires completion of full 30-hour course)

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



Training Proposal for:
Tech Serve Alliance - So Cal Chapter, Inc.

Agreement Number: ET18-0111

Panel Meeting of: June 23, 2017

ETP Regional Office: North Hollywood

Analyst: J. Romero

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee SB <100	Industry Sector(s):	Technology/IT Aerospace and Defense Technology/Other Biotechnology/Life Sciences Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Statewide	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	≤20%		

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
\$888,100		\$61,612 8%		\$949,712

In-Kind Contribution:	50% of Total ETP Funding Required	\$482,712
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 Priority Rate	Continuous Improvement; Computer Skills	131	8-200	0	\$2,780	\$17.22
				Weighted Avg: 100			
2	Retrainee Priority Rate	Continuous Improvement; Computer Skills	87	8-200	0	\$1,925	\$17.22
				Weighted Avg: 100			
3	Retrainee SB<100	Continuous Improvement; Computer Skills	117	8-200	0	\$2,353	\$17.22
				Weighted Avg: 100			
4	Retrainee	Continuous Improvement; Computer Skills	89	8-200	0	\$1,604	\$17.22
				Weighted Avg: 100			

Minimum Wage by County: \$17.63 per hour in Alameda, San Francisco, Contra Costa, Marin, San Mateo, Santa Clara, and Santa Cruz counties; \$16.96 per hour in Los Angeles; \$17.22 per hour in Orange; \$16.72 per hour in San Diego; \$16.46 per hour in Sacramento County; \$16.16 per hour in all other counties.

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

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

Participating employers may use 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 Front Line Repair Technician, Shipping & Receiving, Warehouse Control, Purchasing Assistant, Admin Support, Operations, Sales, Marketing, Information Technology, System Analyst, System Administrator, lead Person, Quality Inspector, Programmer Analyst, Marketing support, network Engineer, Network Administrator, Financial Analyst, Database Administrator, Sales/Marketing Administrator, Application Architect, Human Resource Associate, Manager, Supervisor	\$16.16 - \$33.20	55
System Analyst, System Administrator Leads, Quality Inspector	\$23.00 - \$48.25	91

Programmer Analyst, Marketing Support	\$27.50 - \$55.75	41
Network Engineer, Network Administrator, Financial Analyst	\$25.00 - \$53.50	83
Database Administrator, Sales/Marketing Administrator	\$30.25 - \$59.50	45
Application Architect, Human Resource Associate	\$35.50 - \$62.50	40
Managers, Supervisors	\$35.50 - \$58.50	69

INTRODUCTION

This is the third proposal for Tech Serve Alliance – So Cal Chapter, Inc. (TSA) www.techservealliance.org.

Founded in 1987, TSA is an all-volunteer organization providing Information Technology (IT) and Engineering solutions to Technology companies, consultants and suppliers throughout California. One of TSA's key initiatives is developing the skills of employees in its member companies in technology-driven industries such as: automotive, business services, software, manufacturing, health care, entertainment and new media.

PROJECT DETAILS

Employer Demand

The curriculum was developed in direct response to the demand from participating employers for Computer Skills in Cybersecurity. In addition, the training will support the process improvement in Continuous Improvement to upgrade required quality certification and standards.

The proposed Cybersecurity training will equip workers with the knowledge, skills and ability to identify and avoid a wide variety of security threats. The goal is to eliminate human error when using corporate computing resources. In addition, many participating employers need training in process improvement (Continuous Improvement) to upgrade certifications (ISO, AS and NADCAP) as required in certain industries (aerospace, computing and communications).

Some participating employers already provide training in complementary technologies and process improvement. The ETP funds will give them the opportunity to augment their efforts. The employers have stated that this additional level of training could not be made available without ETP funding.

Curriculum Development

TSA has retained Texcellent, a training company located in Irvine, to assist with curriculum developments. TSA has conducted surveys with managerial staff in Human Resources, Training and IT with a core group of participating employers. The companies were asked to identify new technologies and initiatives.

Texcellent obtains direct feedback from the students after each training class by using surveys. This helps them to not only improve the quality of instruction but to also constantly customize the TSA curriculum to remain current and relevant.

Marketing and Support Costs

TSA's marketing and recruitment includes outreach to new employers as well as referrals from employers who have participated in previous ETP contracts. TSA has contracted with Texcellent and Taurus Corp to assist in this effort. Texcellent and Taurus Corp contacts each

potential employer to begin the recruitment process. TSA maintains an active web site and use Internet marketing to educate employers on available training opportunities.

TSA has an extensive database of businesses in electronics, technology, manufacturing and business services industries who are members and clients. Companies are represented in electronics, technology, manufacturing and business services industries. Additionally, Texcellent and Taurus Corp uses social media marketing extensively to reach out to IT Directors, CIOs and CTOs. TSA along with Taurus Corp and Texcellent's marketing activities included email marketing, social media marketing, IT industry events/trade shows, telemarketing, internet marketing and in-person visits to companies. TSA, Taurus Corp and Texcellent also conduct an extensive employer training needs assessment.

Beyond the core group of employers already identified and surveyed, TSA, Texcellent and Taurus Corp will continue to recruit participating employers and assess employer-specific job training requirements throughout the term of the project as noted above. TSA's goal is to specifically focus on priority industries and small businesses. Due to the intensive outreach efforts required to market the program, research training requirements and enroll participating employers, TSA has requested an 8% support costs of which Taurus Corp and Texcellent will each receive 1.5% of the total amount of support costs.

Core Group of Employers

All participating employers in the core group have been determined to meet out-of-state competition standards. According to TSA, employers participating in this project will not, or have not, participated in other ETP projects where Texcellent and Taurus Corp were subcontractors.

Reimbursement Rate

The curriculum is for IT coursework at an advanced level focused on Cybersecurity Training which were developed sole for the needs of participating employers. (See Exhibit B) However, TSA is not asking for reimbursement at the higher AT rate. Instead, the four Job Numbers in this proposal will be reimbursed at the standard rate (Small Business and Single Employer), as pertinent. For this reason, the trainer-to-trainee ratio will also be standard class lab at 1:20, not 1:10 as required for the AT rate.

Training Plan

Computer Skills (50%) – This training will be delivered to all occupations. Training will cover topics in Cybersecurity.

Continuous Improvement (50%) – This training will be provided to manufacturing, production, operations, warehousing, quality, purchasing and sales occupations. These occupations need Continuous Improvement training in order to improve service delivery efficiency, quality and consistency in performing their jobs.

E-Learning

Texcellent, Inc. will deliver live, instructor-led e-learning training over the Internet using GoToMeeting. Its newly designed courses and lab exercises will greatly enhance the learning experience of the trainees by simulating the 'real world' environment in which IT systems are deployed, specifically in areas of preventing and handling Cybersecurity attacks. Participating employers will provide the equipment that the trainees will need to do lab exercises in the form of servers, software, switches, routers and mobile computing devices.

Although 100% of training was conducted online via GoToMeeting (GTM) in the last ETP Agreement, TSA anticipates approximately 50% of the training will only be conducted through E-learning. The other 50% of training, particularly Continuous Improvement, provided by Taurus Corporation will be instructor-led classroom/lab training at the employer work sites. This training will apply to companies that have training facilities equipped with the necessary equipment, hardware and software; and those with a large number of employees to make the on-site class economically feasible to conduct.

Training Vendor Qualifications

TSA has selected Texcellent, Inc. an IT training provider, to deliver 50% of the training (Computer Skills) and Taurus Corporation to deliver the other 50% of the training (Continuous Improvement) in this proposal.

Training Coordinator

TSA's Co-President will coordinate the delivery and compliance of the proposed ETP-funded training.

Substantial Contribution

TSA 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% to 50%. Small businesses with 100 or fewer full-time employees are not subject to this provision.

Electronic Recordkeeping

TSA will utilize Texcellent's electronic recordkeeping to document training in Computer Skills and Taurus Corp will use manual rosters to document training in Continuous Improvement. GTM Reports and manual rosters will also be maintained by TSA, Texcellent and Taurus Corp for monitoring purposes.

Commitment to Training

TSA 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. These employers provide on-going training in the form of web-based, quality assurance and on-the-job training. Employers stated that although they have training programs, they are unable to keep up with the amount and frequency of technical training needed to remain competitive. Safety training is provided by the participating employers in accordance with all pertinent requirements under state and federal law.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECT

The following table summarizes performance by TSA under ETP Agreements completed within the last five years. Saisoft provided administrative services and delivered training for both of the Agreements.

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0400	Irvine	04/05/2015– 04/07/2016	\$649,865	\$649,865 (100%)
ET12-0377	El Segundo	05/07/2012– 05/06/2014	\$198,377	\$175,195 (88%)

DEVELOPMENT SERVICES

Texcellent, Inc., in Irvine, assisted with the development of this proposal at no cost.

ADMINISTRATIVE SERVICES

Texcellent, Inc. (in Irvine) and Taurus Corporation (in Diamond Bar) will perform administrative services with a total combined fee not to exceed 13% of payment earned.

TRAINING VENDORS

TSA retained Texcellent, Inc. of Irvine to provide Computer Skills training for a fee of \$361,000 and Taurus Corporation of Diamond Bar to provide Continuous Improvement training for a fee of \$361,000. Other trainers will be identified for ETP record-keeping purposes, as they are retained.

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

8– 200

Trainees may receive any of the following:

CONTINUOUS IMPROVEMENT (50%)

- PMT-SK: Project Management Skills
- PMT-MP: Project Management using MS Project
- PMT-SD: Information Technology Project Management
- Quality Management
 - ISO9001
 - AS9100
 - AS9110
 - AS9120
 - ISO13485
 - TS16949
 - ISO22000
 - ISO14001
 - Safe Quality Food
 - 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
 - Kaizen
 - Internal Auditor
 - Inventory Management
 - Supply Chain Management
 - Foreign Object Debris (FOD) Prevention
 - Building High Performance Teams
 - Leadership Skills
 - Project Management
 - Problem Solving/Root Cause
 - Sales Skills

COMPUTER SKILLS (50%)

- Cybersecurity
 - Secure Access Safeguards
 - Safety Against Malware, Ransomware and Spyware

- Protection from Spam, Phishing and Spearphishing
- Social Engineering Attack Vectors
- Email and Messaging Safety
- Safe Browsing Practices
- Mobile Device (Phones/Tablets) Security
- Wifi Security in Public Access Areas
- Home Network Security
- Data Security Compliance Requirements
- Social Media Use Do's and Don't's
- Case Studies of Security Breaches
- Advanced Persistent Threats
- Developing a "Cybersecurity First" Company Culture

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

Contractor's Name: Tech Serve Alliance – So Cal Chapter, Inc.

CCG No.: ET18-0111

Reference No: 17-0239

Page 1 of 2

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Corpinfo Services

Address: 2050 S. Westgate Avenue

City, State, Zip: Los Angeles, CA 90025

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 85

Total # of full-time company employees in California: 75

Company: Pacific Aerospace Resources and Technologies

Address: 18200 Phantom West

City, State, Zip: Victorville, CA 92394

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 110

Total # of full-time company employees worldwide: 110

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

Company: Prosum Technology Services

Address: 2041 Rosecrans Avenue, Ste 220

City, State, Zip: El Segundo, CA 90245

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 90

Total # of full-time company employees worldwide: 141

Total # of full-time company employees in California: 121

Company: Safeway Sign Company

Address: 9875 Yucca Road

City, State, Zip: Adelanto, CA 92301

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 48

Total # of full-time company employees worldwide: 48

Total # of full-time company employees in California: 48

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Tech Serve Alliance – So Cal Chapter, Inc.

CCG No.: ET18-0111

Reference No: 17-0239

Page 2 of 2

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Stratus Aircraft Services, Inc.

Address: 265 N. Leland Norton Way

City, State, Zip: San Bernardino, CA 92408

Collective Bargaining Agreement(s): No

Estimated #of employees to be retrained under this Agreement: 23

Total # of full-time company employees worldwide: 23

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

Company: Velocity Aerospace

Address: 2840 N. Ontario Street

City, State, Zip: Burbank, CA 91504

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 45

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



Training Proposal for: **Carpenters Training Committee for Northern California**

Agreement Number: ET18-0903

Panel Meeting of: June 23, 2017

ETP Regional Office: San Francisco Bay Area

Analyst: D. Woodside

PROJECT PROFILE

Contract Attributes:	Retrainee Apprenticeship Veterans	Industry Sector(s):	Construction Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Northern California	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No United Brotherhood of Carpenters & Joiners of America		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
\$877,780		\$61,547 8%		\$949,327

In-Kind Contribution:	50% of Total ETP Funding Required	Inherent
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Pre-Apprentice	Commercial Skills, Literacy Skills	118	8-200	0	\$3,882	\$22.04
				Weighted Avg: 165			
2	Journeyman	Commercial Skills, Continuous Improvement, OSHA 10/30	47	8-200	0	\$941	\$31.40
				Weighted Avg: 40			
3	Apprentice	Commercial Skills	228	8-200	0	\$1,668	\$22.04
				Weighted Avg: 120			
4	Apprentice Veteran	Commercial Skills	40	8-200	0	\$1,668	\$22.04
				Weighted Avg: 120			

Minimum Wage by County: Priority Industry Statewide Average Wage: \$22.04 per hour.

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

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

Up to \$0.06 per hour may be used to meet the Post-Retention Wage requirement for Job Numbers 1, 3, and 4.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Pre-Apprentice Carpenter	\$21.98	118
Apprentice and Veteran Apprentice Carpenter	\$21.98 - \$44.08	268
Journeyman Carpenter	\$31.40 - \$46.55	47

INTRODUCTION

Carpenters Training Committee for Northern California (CTCNC) www.ctcnc.org is the educational organization that provides Pre-Apprentice, Apprentice, and Journeyman training services for union carpenters throughout Northern California. CTCNC is funded by a joint labor and management trust, as agreed to in collective bargaining. The CTCNC Apprenticeship training program has been established for many years as approved by the Division of Apprenticeship Standards (DAS).

The United Brotherhood of Carpenters & Joiners of America, which includes 26,541 journeymen carpenters, serves on CTCNC and the Board of Trustees. Signatory employers also serve on both the Committee and the Board, through the Construction Employers' Association of California (CEA).

CTCNC also provides training for 4,891 registered Apprentices in 46 counties across Northern and Central California. Given the broad scope of this geographic region, and the large number of

Apprentices to be trained, a \$450,000 cap per program sponsor may be overly restrictive. As with the active contract, staff recommends funding at approximately twice the “program sponsor” cap. The overall MEC cap would remain the same at \$950,000. This closely tracks performance under the active contract, where payment earned is projected to be above 100% for funding that was approved in FY 2016/17. If approved, this proposal will be funded in FY 2017/18 (one contract per Fiscal Year).

This is the seventh ETP Agreement between ETP and CTCNC. This is the third time Veterans have been introduced as a distinct cohort of trainees. CTCNC has been successful in its efforts to serve Veterans: 83 Apprentice Veterans were trained and retained under its active contract.

CTCNC reports that the number of Apprentices in its program has increased by over 20% in the last year. This rate of program expansion is expected to continue during the next two years. (When CTCNC submitted its application in 2016, there were 4,000 Apprentices; today there are 4,891.

Employer Demand for Training

There is significant demand for carpenters and other construction workers in Northern and Central California as the economy remains strong and construction expands. Among the larger projects where carpenters are working is the Salesforce Tower in San Francisco, the Apple campus in Cupertino, the expansion of the UC Merced campus, and the high-speed rail project in the San Joaquin Valley region. These projects are driving CTCNC to recruit more pre-Apprentices and indenture more Apprentices.

Apprenticeship Program

Apprentice training may not displace any other source of government funds, or replace an existing Apprenticeship program approved by the Division of Apprenticeship Standards (DAS). As such, ETP funding supplements the cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved Apprenticeship training. Depending on the type of trade, Apprenticeship programs vary in length. In this proposal, the Carpenters Apprentice program is four years.

For the building trades, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by \$5, reducing the priority industry rate from \$18 to \$13 per hour. In addition, the Panel adopted a “blended rate” for Journeymen, reflecting the fact that they may be employed by a variety of contractors over the two-year term of contract ranging from large employers, to small (≤ 100 employees). This is \$22 per hour, midway between the Priority Industry standard rate (\$18) and Small Business rate (\$26). [Note: This “blended rate” has been extended to Pre-Apprentices, for ease of administration.] The ETP wage for Apprentices and Pre-Apprentices is no less than \$22.04 per hour, tracking the Special Employment Training wage as modified for priority industries. For this proposal, the actual wages for Journeymen are shown in the Training Plan Table and contract since the hourly wage exceeds \$22.04.

PROJECT DETAILS

All training is class/lab and center-based. CTCNC is headquartered in Pleasanton, but operates five training centers. The Fairfield center consists of two buildings, 10 classrooms, 60,000 square feet of shop space, and a welding facility. The 56,000 square foot Pleasanton center has 16 classrooms, an auditorium, and a welding shop with 25 welding booths. The Hayward center has 40,000 square feet of training space and a welding shop. The Fresno center is 12,000 square feet with a welding shop and two classrooms. The Morgan Hill center is 53,000 square feet with 8 classrooms.

Training under this proposal will begin in July 2017 and is estimated to be completed by July 2018.

Training Plan

Pre-Apprentice – Job Number 1

Commercial Skills (80%) - Pre-Apprentice training will provide basic skills needed to perform productive work on a job site, including use of lifts and scaffolding, use of basic hand and power tools, material handling, framing, layout, basic blueprint reading, and concrete framework. The pre-Apprentice training is needed to improve retention rates within the industry and to better serve the signatory employers who hire Apprentices. Persons who successfully complete the pre-Apprentice training have the basic skills needed to succeed on a construction jobsite and keep working in the construction industry. This training reduces turnover and builds skills.

Literacy Skills (20%) - Training will include Basic Algebraic Equation, Communication Skills, Fractions, Decimals, Positive and Negative Numbers, Math Skills for Construction, and Understanding the Numbering System to give trainees the proper foundation to be successful.

Journeyman – Job Number 2

Commercial Skills (85%) - Training will be offered in advanced skills such as Bridge Building, Advanced Millwright Skills, Green Building, Hardwood Flooring, Lead Abatement, Pile Driving Setup and Operation, Stairs, Roofs, and Welding. These courses will be more advanced than Apprentice courses. This training will supply employers with journey level carpenters with specialty skills and certifications, including welding, commercial construction practices, and advanced rigging and scaffolding.

Continuous Improvement (5%) - Training will include Team Skills and Team-Leader Skills to ensure that trainees can lead work-teams at their worksites.

OSHA 10/30 (10%) - Journeymen trainees may receive OSHA 10 and/or 30 training in a series of courses “bundled” by industry sector and occupation. Typically, it is delivered to workers in the building trades. OSHA 10 consists of 10 hours of training and OSHA 30 consists of 30 hours of training. This training is not required as a condition of doing business in California. However, the coursework must be approved by, and the instructors must be certified by Cal-OSHA. When OSHA is delivered via Computer-Based Training, training hours must be delivered in a classroom over a finite amount of time, and the vendor must have a certified instructor present to confirm attendance.

Apprentices – Job Numbers 3 and 4

Commercial Skills (100%) - Training will be offered in Carpenter Apprentice, Drywall/Lather Apprentice, Insulator Apprentice, Pile Driver Apprentice, Shingler Apprentice and Acoustical Installer Apprentice to ensure trainees have the skills required for the construction industry.

Veterans

The training curriculum will be the same as above. These trainees are in a separate Job Number to better track performance for this cohort.

Veterans are recruited directly into first-year Apprenticeships by CTCNC, bypassing the pre-Apprentice requirement.

CTCNC works in cooperation with Helmets-to-Hardhats, a national joint labor-management program (www.ctcnc.org/helmets-to-hardhats) to help transition active duty military personnel into employment in the construction industry, including Apprenticeship programs.

Employer Needs Assessment

The training program was created and is governed by a joint labor management committee established through collective bargaining. Industry needs are determined by the committee, which provides feedback on effectiveness; assessment of employer-specific job requirements; employer discussions to ensure that industry trends are being addressed in each training program; feedback from the labor and management team that administers the program; and evaluations from trainees and program staff.

Marketing and Support Costs

Employers participate as members of CTCNC, which is a joint labor-management committee. They are notified of training through CTCNC's website, mailings, and presentations. Although these are signatory employers, additional recruitment is still needed for Pre-Apprentice training, Journeyman awareness, and assessment. CTCNC requests, and staff recommends, 8% in support costs for marketing, recruitment, and assessment activities.

Commitment to Training

CTCNC has provided training to this trade for over 50 years. Signatory employers will continue to contribute to the training trust for every hour worked by Apprentices and Journeymen. Safety training is, and will continue to be, provided by the participating employers in accordance with all pertinent requirements under state and federal law.

Impact/Outcome

Trainees will receive industry certifications specific to their training including the following:

- Aerial Lift Safety
- Asbestos Abatement
- Bridge Building
- Commercial Door Hardware
- Concrete Formwork
- Confined Space Entry

Fall Protection
Fork Lift Operator Safety
Green Building Awareness
Hazardous Waste General Site Worker
Lead Abatement
Lockout/Tag out
Material Safety Data Sheets
Rigging
Scaffold Erecting
Scaffold User
Solid Surface Materials Installation
Welding

Trainer Qualifications and Training Coordinator

Trainers are qualified Journeymen with extensive practical and training experience employed by CTCNC. Four additional CTCNC staff members are responsible for training coordination, including but not limited to marketing, recruitment, needs assessments, scheduling, and ETP administration.

Electronic Recordkeeping

Staff has approved the CTCNC's use of a Learning Management System for recordkeeping.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
*ET17-0902	\$949,180	08/01/2016-07/31/18	1,805	1,805	1,091

*All training was completed by December 30, 2016. ETP records show that 1,091 trainees have been placed. The ETP On-Line system indicates 86,996 reimbursable hours have been tracked which equates to over 100% of the Agreement amount. Fiscal Close-out will be submitted in July 2017.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0907	Central & Northern California	08/31/2015–08/30/2017	\$948,416	\$948,416 (100%)

ET15-0903	Central & Northern California	07/01/2014– 06/30/2016	\$1,191,507	\$1,191,507 (100%)
ET14-0900	Central & Northern California	07/01/2013– 06/30/2015	\$847,977	\$847,977 (100%)
ET12-0175	Central & Northern California	11/21/2011– 11/20/2013	723,370	\$722,224 (99%)

DEVELOPMENT SERVICES

CTCNC retained Steve Duscha Advisories in Sacramento to assist with development of this proposal for a flat fee of \$10,000.

ADMINISTRATIVE SERVICES

CTCNC also retained Steve Duscha Advisories to perform administrative services in connection with this proposal for a fee not to exceed 10% of payment earned.

TRAINING VENDORS

N/A

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200

Job Number 1: Pre-Apprenticeship

Trainees may receive any of the following:

COMMERCIAL SKILLS

- Architect's Scale
- Basic Blueprint Reading
- Basic Hand Tools
- Basic Roof Structures
- Carpenter Terminology
- Compressors
- Concrete Formwork
- Construction Math
- Drywall Framing
- Exterior Finish Applications
- Forklift
- Foundation walls
- Framing
- Green Awareness
- Hazard Communicating
- Job site roles and responsibilities
- Job site systems
- Layout
- Lead and Asbestos Awareness
- Material Handling
- Measurement
- Negotiating with co-workers at the job site
- Orthographic Drawing
- Power Tools
- Safe Working Conditions
- Scaffold Use
- Solar installation
- Using lifts
- Wood and Metal Framing

LITERACY SKILLS

- Basic Algebraic equation
- Communication Skills
- Fractions, decimals, positive and negative numbers
- Math skills for construction
- Understanding the numbering system

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

Class/Lab Hours

8-200

Job Number 2: Journeymen

Trainees may receive any of the following:

COMMERCIAL SKILLS

- Acoustical Ceilings
- Advanced millwright skills
- Aerial Lift Safety
- Asbestos Abatement Worker or Supervisor
- Blueprint Reading
- Bridge Building Certification
- Bridge Falsework
- Cleanroom Protocol & Construction
- Commercial Door Hardware
- Commercial Interior Systems
- Commercial Metal Lath (Drywall/Lather)
- Commercial Solar Installation
- Concrete Formwork
- Confined Space Awareness
- Confined Space Entry
- Construction Calculator
- Construction Math & Intro to Working Drawings
- Ergonomics for Carpenters
- Fall Protection
- Firestop Installation
- Fork Lift Operation
- Framing
- Framing Square
- Green Building
- Hardwood Floor Layers/Floor Sanding & Finishing
- Hardwood Flooring
- Hazardous Waste General Site Worker
- Installation of Strip Floors
- Insulation Installation
- Layout Instruments
- Lead Abatement
- Managing safety at the worksite
- Material Safety Data Sheets (MSDS)
- Metrics In Construction
- Pile Driving Setup and Operations
- Rigging
- Roofs
- Safe working conditions
- Scaffolds
- Shaft Liner Construction
- Solid Surface Materials Installation
- Stairs
- Steel Framing
- Superintendent / Leadership Training

- Suspended Ceilings and Soffits
- Welding
- Working Drawings
- Working with gas turbines for millwrights
- Working with pumps for millwrights

CONTINUOUS IMPROVEMENT

- Team skills
- Team leader skills

OSHA 10/30 (OSHA Certified Instructor)

- OSHA 10 (requires completion of full 10-hour course)
- OSHA 30 (requires completion of full 30-hour course)

Class/Lab Hours 8-200

Job Numbers 3 and 4: Apprentices/Veteran Apprentices

Trainees may receive any of the following:

COMMERCIAL SKILLS

Carpenter Apprentice

- Foundations & Floors
- Blueprint Reading - Basic,
- Wood Framing
- Concrete Formwork
- Exterior Finish
- Blueprint Reading - Advanced
- Concrete Bridge Building
- Interior Finish
- Concrete Structures/Equipment/Safety/Green Technologies
- Rigging
- Layout Instruments
- Engineered Structural Systems
- Commercial Steel Framing
- Commercial Door Hardware
- Stair Building
- Roof Framing
- Introduction to Welding & Cutting

Drywall/Lather Apprentice

- Drywall/Lathing, Trade Safety
- Basic Applications
- Mathematics Review
- Commercial Framing Systems and Fire Stop
- Doors, Frames, Hardware & Windows
- Blueprint Reading I
- Blueprint Reading II
- Applied Blueprint Technology
- Welding (Heavy Plate)

- Welding (Light Gauge)
- Residential Metal Stud Framing
- Exterior Systems & Trims
- Interior Metal Lath Systems
- Shaft Protection & Ceiling Systems
- Arches, Furring & Advanced Systems
- Advanced Construction Techniques

Insulator Apprentice

- Construction Math, Intro to Working Drawings for Insulators, Firestop,
- Residential Blueprint Reading for Insulators, Fork Lift, Driver Safety Training
- Residential Insulation Installation and Weatherization
- Commercial Blueprint Reading for Insulators, Welded Frame-Mobile Tower Scaffolds
- Commercial & Industrial Insulation Installation, Aerial Lift
- Energy Conservation Codes and Standards for Insulators
- Green Advantage
- CalGreen

Pile Driver Apprentice

- Worker Safety & Tool Skills for Pile Drivers - Fall Protection
- The Pile Driver Apprentice & The Trade, Construction Math
- Rigging
- Concrete & Formwork
- Welding 1 - SMAW (Shielded Metal Arc Welding) 1F, 2F, 3F, 4F
- Introduction to Pile Driving Land & Water - Aerial Lifts
- Welding 2 - SMAW 1G, 2G - Fork Lifts
- Advanced Pile Driving - Land & Water
- Wharfage & Marine Structures
- Welding 3 - SMAW 3G Certification
- Introduction to Structural Blueprints & Layout Instruments
- Bridge Building & Advanced Structural Blueprints
- Falsework, Shoring & Heavy Timber Framing
- Advanced Formwork
- Welding 4 - SMAW 4G Certification
- Welding 5 - FCAW 3G Certification
- Welding 6 - FCAW 4G Certification

Shingler Apprentice

- Blueprint Reading - Basic, Union Benefits Presentation
- Flashing, Shakes & Composition
- Blueprint Reading - Advanced
- Shingles, Sidewalls, Tile & Metal
- Rigging

Acoustical Installer Apprentice

- Blueprint Reading - Basic, Union Benefits Presentation
- Commercial Steel Framing

- Installation of Exposed & Concealed Grid Ceilings
- Welded Frame & Mobile Tower Scaffold
- Special Ceiling Systems, Aerial Lift.
- Introduction to Welding & Cutting
- Access Floor Systems
- Integrated Ceilings & Special Techniques
- Blueprint Reading - Advanced
- Layout Instruments

Hardwood Floor Layer Apprentice

- Tools of The Trade, Installation of Wood Floors
- Athletic Floors, Finishing & Repairing Floors
- Blueprint Reading - Basic, Union Benefits Presentation
- Blueprint Reading – Advanced

Millwright Apprentice

- Millwright 16 Hour Safety & Millwright Tool Skills
- The Millwright Apprentice & The Trade
- Math Applications - Fall Protection
- Rigging
- Materials of Construction
- Layout Procedures - Fork Lift (Industrial & Rough Terrain)
- Optical Instruments
- Blueprint Reading - Aerial Lift
- Cutting & Welding 1
- Welding 2 - SMAW
- Monorails
- Conveyors
- Installation of Machinery
- Maintenance of Machinery
- Precision Tools & Shaft Alignment
- Turbines
- Welding 3 – Certification

Scaffold Erector Apprentice

- Introduction to Scaffolds - Confined Space
- Welded Frame & Mobile Tower Scaffold
- Blueprint Reading - Basic, Union Benefits Presentation
- System Scaffold
- Hazard Awareness - Aerial Lift
- Blueprint Reading - Advanced
- Suspended Scaffolds, Shoring Systems
- Tube & Clamp Scaffold
- Layout Instruments
- Blueprint Reading for Scaffold Erectors
- Rigging
- Introduction to Welding & Cutting
- Welding

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



Training Proposal for:

The Corporation for Manufacturing Excellence dba MANEX

Agreement Number: ET18-0113

Panel Meeting of: June 23, 2017

ETP Regional Office: San Francisco Bay Area

Analyst: C. Hoover

PROJECT PROFILE

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

FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$887,560		\$61,600 8%		\$949,160

In-Kind Contribution:	50% of Total ETP Funding Required	\$851,220
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, Mgmnt. Skills, Literacy Skills	440	8-200	0	\$1,155	\$16.16
				Weighted Avg: 60			
2	Retrainee Priority Rate SB<100	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, Mgmnt. Skills, Literacy Skills	260	8-200	0	\$1,696	\$16.16
				Weighted Avg: 61			

Minimum Wage by County: Job Numbers 1 and 2: \$17.63 per hour in Alameda, Contra Costa, Marin, San Francisco, San Mateo, Santa Clara counties; \$17.22 per hour in Orange County; \$16.96 per hour in Los Angeles County; \$16.72 per hour in San Diego County; \$16.46 per hour in Sacramento County; \$16.16 per hour in all other counties.

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

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Support Staff	\$17.63 - \$35.00	70
Production/Quality Staff	\$17.63 - \$25.00	220
Engineering Staff I	\$25.00 - \$55.00	45
Engineering Staff II	\$56.00 - \$85.00	25
Supervisors	\$30.00 - \$40.00	25
Managers	\$35.00 - \$55.00	15
Front Office Staff	\$17.63 - \$30.00	40
Job Number 2		
Support Staff	\$17.63 - \$25.00	45
Front Office Staff	\$17.63 - \$25.00	35
Production/Quality Staff	\$17.63 - \$25.00	120
Engineering Staff	\$25.00 - \$55.00	20
Supervisors	\$25.00 - \$35.00	15
Managers	\$35.00 - \$45.00	10
Owners	N/A	15

INTRODUCTION

Founded in 1995 and headquartered in San Ramon, The Corporation for Manufacturing Excellence (Manex) (www.manexconsulting.com) provides business improvement services to manufacturers. These services include corporate strategy, strategic planning and marketing development of Lean manufacturing, supply chain and logistics. It also assists clients with staff development in Six Sigma principals, ISO processes, performance management and systems implementation including ERP readiness, change management and program management. Manex is a partner with the National Institute of Standards and Technology, Manufacturing Extensio Partnership, whose goal is to work with small to mid-size companies by providing business assistance and training with the goal of retaining businesses and jobs in California.

This will be Manex's fourteenth Agreement with ETP. During Manex's previous ETP Agreements, it served California manufactures of aircraft parts, machine shops, recycled rubber manufacturers, food manufacturers and processors, high tech medical device manufacturers, solar panels manufacturers, PC board manufacturers, satellite and consumer electronics manufacturers, printers and flow meters. Training was delivered to production workers, customer service representatives, owners, sales, quality representatives, engineers, technicians and supervisors.

In the current 2015/2017 Agreement, 56% of the companies that Manex employed for ETP funding with were small businesses with less than 100 employees. However, Manex is seeing more of the larger companies request training.

PROJECT DETAILS

Manex's new Proposal will be similar to its prior projects. However, Manex's territory is smaller than before, and the Company is seeing more emphasis on leadership development for Line Leads and new Supervisors that were promoted from the production floor. Manex expects more Food Safety training, since these regulations are continuously updated. The majority of the training will be conducted at participating employers' facilities.

Training Plan

Training for participating employers will improve processes by reducing waste and increasing profitability, while allowing the companies to acquire new customers and enter new industries and markets. The curriculum addresses the participating employers' needs such as strategy, sustainability, innovation, supply chain, total cost of ownership, enterprise resource planning (ERP) readiness and change management.

Manex will customize each participating employers' training plan consisting of the following:

Business Skills (15%) - Training will be offered to all occupations to give trainees the skills needed to provide quality customer service to internal and external customers.

Continuous Improvement (60%) - Training will be offered to all occupations to enhance problem solving and decision making skills, which increase efficiency and lower operating costs.

Computer Skills (2%) - Training for all occupations will improve skills in software systems, computer-aided design software programs, enterprise manufacturing management, database applications, and website development and maintenance.

Literacy Skills (3%) - Training will be offered to trainees that need basic skills to perform their jobs or to fully participate in the training programs. The training will improve employee teamwork, communication and productivity.

Management Skills (10%) - Training will be offered to Managers and Supervisors to improve communication and provide leadership in their respective departments. With improved the use of strategic planning, the trainees will be able to become effective leaders.

Manufacturing Skills (10%) - Training will be for Managers, Supervisors, Production/Quality and Engineering Staff. Training in Lean manufacturing, equipment maintenance, manufacturing techniques, and cross training will ensure that production processes are streamlined resulting in timely delivery, cost savings, reduction in waste and rework.

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.

Substantial Contribution

Manex serves large and small companies, some of which may have received training in prior ETP contracts. Some large participating employers may have received the benefits of training with payment earned in excess of \$250,000 within the past five years at the same facility. Accordingly, reimbursement for trainees at facilities with earnings over \$250,000 may be reduced by 15% (up to 30%) to reflect the company's Substantial Contribution to the cost of training. Participating employers who have had a substantial contribution applied in the past may have funding reduced by 30% (up to 50%). This provision does not apply to Small Business with fewer than 100 full-time employees.

Marketing and Support Costs

Manex is actively involved with various community organizations, such as economic development partners, cities, chambers of commerce, colleges, and business groups. Manex staff also sponsors seminars and conferences throughout Northern California promoting changes and advancements in training opportunities for manufacturers.

Manex requests and staff recommends an 8% support cost for help with recruitment and marketing efforts required to secure participating employers.

Commitment to Training

Participating employers' internal training programs will continue to provide job-specific and organization-wide training related to initial on-boarding, orientation, company policies, basic manufacturing skills specific to their operations, machine specific training, process training, general health and safety training. The ETP-funded training will improve operational performance and support increased manufacturing competitiveness.

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

Manex's Director of Client Services conducts needs' assessments at client facilities. Once approved, A dedicated ETP Administrator is responsible for ensuring a participating employer meets ETP's guidelines, enrolls and enters data into the ETP online systems, reviews rosters for completeness, conducts invoicing processes and reviews plan updates. Every Manex trainer will be responsible for collecting rosters for training delivered and provide the rosters to Manex's ETP project administrator.

Trainer Qualifications

The majority of training will be provided directly by Manex in-house experts. Manex employees also have a wide range of certifications including Certified Quality Engineer, Project Management Professional, and Six Sigma Master Black Belt. Training will only be delivered by outside vendors if an employer requires specific training that Manex does not have the internal expertise to deliver.

Impact/Outcome

Manex assists manufacturers prepare for certification programs such as ISO Certification, Quality Standards, and Safe Quality Food certifications of completion. These certifications and/or product diversification often lead to new markets and increased sales, which help companies grow and provide workforce stability.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET16-0147	\$949,912	9/8/15 – 9/7/17	740	899	69

Based on ETP Systems, 29,453 reimbursable hours have been tracked for potential earnings of \$654,738 (69% of approved amount). The Contractor projects final earnings of 90% based on training currently committed to by employers and in progress through June 2017 of final training.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET14-0274	Statewide	2/3/14 – 2/2/16	\$656,725	\$634,428 (97%)
ET12-0364	Statewide	4/30/12 – 4/29/14	\$749,192	\$537,037 (72%)
ET11-0239	Statewide	5/9/11 – 5/8/13	\$396,308	\$394,812 (99%)

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

Custom Solutions Inc. of Danville will provide Sales, Marketing and Leadership training for a fee of \$250,000.

Gemba Quality Consulting of Fairfield will provide Lean Manufacturing training for a fee of \$100,000.

Jeff Lewis of Mountain View will provide ISO, 1345 Medical Device and AS 9100 training for a fee of \$100,000.

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

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

8 - 200

Trainees may receive any of the following:

BUSINESS SKILLS

- Budget Analysis
- Business Plans
- Business Strategies
- Communication Skills
- Computer/Internet Applications in Business
- Change Management
- Customer Service
- Developing Sales Strategies
- Developing Marketing Strategies
- Excel - Intermediate Skills
- Excel - Advanced Skills
- ERP/MRP Readiness
- ERP/MRP System Implementation
- Export Tech
- Inventory Control
- Listening Skills
- Materials Management
- Marketing for Small/Medium-Sized Manufacturers:
 - Evaluating Marketing Effectiveness
 - Marketing Concepts
 - Marketing Techniques
 - Practical Marketing Applications
- Multi-Cultural Awareness
- Negotiating Skills
- New Product Introduction
- Project Management Techniques
- Relationship Building for Small/Medium-Sized Mfg
- Business Administration for Small/Medium-Sized Mfg
- Selling/Serving the Customer
- Strategic Planning
- Strategic Sourcing
- Total Cost of Ownership
- Sustainability
- Technical Writing

COMPUTER SKILLS

- Accounting Systems
- CAD/CAM/CAE
- CNC
- Computer-Based/Web-Based Training Systems
- Communications Systems
- Database Management
- Desktop Publishing
- Digital Entertainment Systems

- Graphics
- ERP/MRP Systems
- Internet
- Payroll Systems
- Presentation
- Programming
- Publishing
- Spreadsheets
- Technical Writing
- Telecommuting
- Website Development and Maintenance
- Word Processing

CONTINUOUS IMPROVEMENT

- Assessment Principles
- Audit Principles
- American Institute of Baking (Quality Standards)
- Basic Quality Tools
- Benchmarking Principles
- Building Teams
- Business Improvement Principles
- Good Manufacturing Practices (cGMP)
- Communication Skills
- Continuous Improvement Skills
- Creative/Innovative Thinking Skills
- Creative Problem Solving Skills
- Cycle-Time Reduction Techniques
- Cycle-Time Management Techniques
- Decision Making Skills
- Defining Problems
- Design for Manufacturing Acceptability
- Design of Experiments
- Developing Action Plans
- Developing Solutions
- Effective Meetings
- Effective Teams
- Effective Writing
- Empowerment Processes
- Food Safety/Food Quality Systems/SFMI/AIB
- Hazardous Assessment Critical Control Point
- Implementation Skills
- Interpersonal Skills
- Interpreting & Analyzing Data
- ISO
- Just-in-Time Production (JIT):
 - Cycle-Time Reduction
 - Cycle-Time Management
 - Developing JIT
 - Evaluating JIT
 - Implementing JIT
 - Organizing for JIT

- JIT Principles
- JIT Production
- Lean Manufacturing
- Leadership Skills
- Manufacturing Excellence
- Monitoring the Process
- Presentations
- Process Control Principles
- Process Capabilities
- Process Improvement
- Process/Product Handling
- Production Scheduling
- Production Operations/Workflow
- Root Cause Analysis
- Self-Directed Work Teams
- Situation/Problem Analysis
- Statistical Process Control (SPC):
 - Data Collection
 - Design for Manufacturing Acceptability
 - Design of Experiments
 - Developing SPC
 - Documenting Processes
 - Evaluating SPC
 - Failure Mode Effects Analysis
 - Five S Principles
 - Graphing
 - Implementing SPC
 - Kaizen Principles
 - Kanban Principles
 - Key Process Indicators
 - Lean Manufacturing Principles
 - Organizing for SPC
 - Root Cause Analysis
 - SPC Concepts, Theory & Application
 - SPC Tools
 - Six Sigma
 - Statistical Techniques
 - Taguchi Methods
 - Variation/Process Control
 - Validation
- System Analysis
- System Strategies
- Taguchi Methods: Design of Experiments
- Team Building/Problem Solving:
 - Building Teams
 - Communication
 - Creative/Innovative Thinking
 - Decision Making
 - Developing Action Plans
 - Developing Solutions
 - Effective Teams
 - Empowerment Process

- High Performance Work Teams
- Leadership
- Multicultural Communication/Diversity
- Problem Solving
- Self-Directed Work Teams
- Situation/Problem Solving
- Team Concepts
- Team Building/Problem Solving
- Teamwork in an Empowered Workforce
- Total Quality Management (TQM):
 - Audit Planning
 - Basic Quality Tools
 - Benchmarking
 - Business Process Improvement Change Process
 - Continuous Improvement
 - Creative Problem Solving/Innovation
 - Creative/Innovative Thinking
 - Developing TQM
 - Evaluating TQM
 - Implementing TQM
 - Organizing for TQM
 - Quality Concepts
 - TQM Strategies
- Train-the-Trainer
- Value Stream Mapping
- Variation/Process Control

MANAGEMENT SKILLS (Managers/Supervisors Only)

- Coaching/Feedback
- Communication Skills
- Conflict Management
- Decision Making/Problem Solving
- Developing Teams
- Effective Meetings
- Effective Writing
- Facilitation Skills
- Finance for Small/Medium-Sized Manufacturers
- Leadership/Management Development
- Managing Change
- Managing Customer Service (Internal & External)
- Managing Innovation
- Manufacturing Cells
- Marketing for Small/Medium-Sized Manufacturers
- Motivation/Reinforcement
- Performance Management
- Project Management
- Strategic Planning

MANUFACTURING SKILLS

- Air Filtration/Clean Room
- Assembly Operations
- Assembly & Surface Mount

- Automated Equipment
- Bagging Machines
- Bio-Science Manufacturing
- Blueprint Reading
- Clean and Green Technology
 - Introduction of Green Manufacturing Practices
 - Manufacturing of Green Technologies and Products
 - Solar, Wind, Alternative Energy
- Computer-Aided Design
- Computer-Aided Engineering
- Computer-Aided Manufacturing
- Computer Numeric Control
- Cellular Manufacturing
- Chemistry
- Computer Electronics
- Cycle Time Reduction
- Cutting/Sewing
- Electro Static Discharge
- Electronics
- Electronic Assembly Workmanship
- Equipment Operations
- Equipment/Preventive Maintenance
- Enterprise Resource Planning
- Facilities Management
- Fabric/Garment Manufacturing Skills
- Food Processing
- Five S Principles
- Good Manufacturing Practices
- Hazard Assessment Critical Control Point (Food Safety)
- Handling Changes
- Inventory Control
- International Standards Organization Certification
- Kaizen Principles
- Kanban Principles
- Layout
- Lean Manufacturing Principles
- Machining
- Machine Trades
- Maintenance Mechanic Overview Level 1
- Maintenance Mechanic Overview Level 2
- Machine Tool Technology
- Introduction to Hand Tools
- Manufacturing Processes
- Meeting Customer Expectations (Internal/External)
- Metrology/Geometric Dimensioning & Tolerances
- Mounts
- Manufacturing Resource Planning
- Optimal Operating Methods
- Physics
- Pneumatics/Hydraulics
- Presses

- Pressing
- Production Techniques
- Programmable Logic Controllers
- Quality
- Re-Engineering Concepts
- Refrigeration/Heating
- Root Cause Analysis
- Sequencing Sewing Operations
- Set-Up Reduction
- Sew Engineering/Setting Piece Rates
- Sew Trainer
- Shipping/Receiving
- Shop Skills -- Drawing, Measurement and Instrumentation
- Soldering Skills
- Special Machines/Inspections
- Statistics Skills for Operations
- Surface Mount Technology
- Technical Training
- Total Productive Manufacturing
- Total Quality Management
- Training Within Industry
- Understanding Product Specs/Drawings
- Value Stream Mapping
- Warehousing Operations/Distribution
- Welding
- Work Measurement
- Workflow
- World Class Manufacturing Principles

LITERACY SKILLS (Cannot exceed 45% of total training hours)

- VESL:
 - Comprehension Skills:
 - Communicating Common Work-Related Instructions
 - Equipment Operation Language
 - Job-Related Vocabulary & Phrases
 - Multi-Cultural Communication
 - Shop Floor Language
 - SPC Language
 - Understanding Common Work-Related Instructions
 - Understanding Schematics Used on the Job
 - Oral Skills:
 - Basic Grammatical Structure
 - Presentation Skills
 - Pronunciation
 - Vocational Vocabulary and Phrases
- Basic Writing Skills
- Completing Job-Related Forms
- Computer Skills
- Reading Comprehension
- Basic Math:
 - Applying Math to Job Functions
 - Fundamentals of Mathematics

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

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

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Manex

CCG No.: ET18-0113

Reference No: 17-0250

Page 1 of 6

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: A-1 Jay's Machining Inc.

Address: 2288 Oakland Rd.

City, State, Zip: San Jose, CA 95131

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 75

Total # of full-time company employees in California: 75

Company: Bay Associates Wire Technologies Corporation

Address: 46840 Lakeside Blvd.

City, State, Zip: Fremont, CA 94538

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained or hired under this Agreement 40

Total # of full-time company employees worldwide: 500

Total # of full-time company employees in California: 85

Company: Bold Data Technology, Inc.

Address: 48363 Fremont Blvd.

City, State, Zip: Fremont, CA 94538

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 50

Total # of full-time company employees in California: 50

Company: Brooks Automation, Inc.

Address: 46702 Bayside Parkway

City, State, Zip: Fremont, CA 94538

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2,000

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

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Manex

CCG No.: ET18-0113

Reference No: 17-0250

Page 2 of 6

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Cal-Weld, Inc.

Address: 4308 Solar Way

City, State, Zip: Fremont, CA 94555

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 116

Total # of full-time company employees in California: 116

Company: D&T Fiberglass, Inc.

Address: 8900 Osage Ave.

City, State, Zip: Sacramento, CA 95828

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 32

Total # of full-time company employees in California: 32

Company: Elcon Precision LLC

Address: 1009 Timothy Dr.

City, State, Zip: San Jose, CA 95133

Company: Elcon Precision LLC

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 60

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

Company: Emerald Kingdom Greenhouse, LLC

Address: 1593 Beltline Road

City, State, Zip: Redding, CA 96003

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 23

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

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Manex

CCG No.: ET18-0113

Reference No: 17-0250

Page 3 of 6

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Foster Farms Dairy dba Crystal Creamery

Address: 529 Kansas Ave.

City, State, Zip: Modesto, CA 95131

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 500

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

Company: IMT Precision, Inc.

Address: 31902 Hayman St.

City, State, Zip: Hayward, CA 94544

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 45

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

Company: MetlSaw Systems

Address: 2950 Bay Vista Ct.

City, State, Zip: Benicia, CA 94510

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 15

Total # of full-time company employees in California: 15

Company: Olympus America Inc.

Address: 2400 Ringwood Ave.

City, State, Zip: San Jose, CA 95131

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained or hired under this Agreement: 60

Total # of full-time company employees worldwide: 5,000

Total # of full-time company employees in California: 550

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Manex

CCG No.: ET18-0113

Reference No: 17-0250

Page 4 of 6

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: PCC Structurals, Inc.

Address: 414 Hester St.

City, State, Zip: San Leandro, CA 94577

Collective Bargaining Agreement(s): no

Estimated # of employees to be retrained or hired under this Agreement 50

Total # of full-time company employees worldwide: 1,000

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

Company: Penumbra, Inc.

Address: 1321 Harbor Bay Parkway

City, State, Zip: Alameda, CA 94502

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained or hired under this Agreement: 60

Total # of full-time company employees worldwide: 450

Total # of full-time company employees in California: 450

Company: Price Pump Manufacturing Co.

Address: 21775 8th Street E.

City, State, Zip: Sonoma, CA 95476

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained or hired under this Agreement: 15

Total # of full-time company employees worldwide: 40

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

Company: Proteus Digital Health Inc.

Address: 2600 Bridge Parkway, Suite 101

City, State, Zip: Redwood City, CA 94065

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 250

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

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Manex

CCG No.: ET18-0113

Reference No: 17-0250

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Simpson Strong Tie

Address: 5956 W. Las Positas Blvd.N

City, State, Zip: Pleasanton, CA 94588

Collective Bargaining Agreement(s): no

Estimated #of employees to be retrained or hired under this Agreement: 40

Total # of full-time company employees worldwide: 500

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

Company: SolarBOS

Address: 310 Stealth Ct.

City, State, Zip: Livermore, CA 94551

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 26

Total # of full-time company employees in California: 26

Company: ThermoFusion Inc.

Address: 2342 American Ave.

City, State, Zip: Hayward, CA 94545

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 30

Total # of full-time company employees in California: 30

Company: Vintage 99

Address: 611 Enterprise Court

City, State, Zip: Livermore, CA 94550

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 26

Total # of full-time company employees in California: 26

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Manex

CCG No.: ET18-0113

Reference No: 17-0250

Page 6 of 6

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Visions Paint Recycling, Inc.

Address: 4105 S. Market Court

City, State, Zip: Sacramento, CA 95834

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained or hired under this Agreement: 15

Total # of full-time company employees worldwide: 30

Total # of full-time company employees in California: 30



Training Proposal for:
UFCW Northern California Meat Apprenticeship Trust Fund
Agreement Number: ET18-0900

Panel Meeting of: June 23, 2017

ETP Regional Office: San Francisco Bay Area

Analyst: C. Hoover

PROJECT PROFILE

Contract Attributes:	Retrainee Apprenticeship	Industry Sector(s):	Services Retail Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Counties Served:	Northern California	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No United Food & Commercial Workers Union (Local 5 and Local 8)		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	≤0%		

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
\$117,936		\$8,190 8%		\$126,126

In-Kind Contribution:	50% of Total ETP Funding Required	Inherent
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Apprentice	Commercial Skills	63	8-200	0	\$2,002	*\$17.85
				Weighted Avg: 144			

*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: SET Wage Non-Priority: \$29.38 [Note: The Post-Retention Wage is based on the union-negotiated wage/benefits.]

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

\$7.15 per hour may be used to meet the Post-Retention Wage. This amount has been verified in the CBA Wage Tables.

Wage Range by Occupation

Occupation Titles	Wage Range	Estimated # of Trainees
Apprentice Meat Cutter	\$10.70 - \$18.00	63

INTRODUCTION

UFCW Northern California Meat Apprenticeship Trust Fund (UFCW Meat Trust) seeks training funds for 63 new and continuing apprentices in the retail and wholesale meat cutting industry. This cohort is larger than under the active contract which had only 43 Apprentice trainees. Apprenticeship training has been offered in California by the United Food and Commercial Workers (UFCW) for 75 years in this industry sector.

The current program sponsored by UFCW Northern California Meat Joint Apprenticeship Committee (JAC) was formed by a merger of three separate Joint Apprenticeship Training Committees (JATC) in Local 5 and Local 8: Humboldt & Del Norte Meat cutters, Oakland & Vicinity Meat Industry and Santa Clara County Meat Cutters. (The merger was approved by DAS in late 2014.) Individual employers negotiate directly with UFCW, as expressed in a Master Agreement (Safeway MOU).

Headquartered in Hayward, the JAC serves 48 counties throughout Northern California. The Trust will deliver training at the following six locations: Hayward, Modesto, Sacramento, So. San Francisco, Novato, and San Jose.

UFCW is a non-traditional Apprenticeship program. Traditional apprenticeships are in the building trades. The term “non-traditional” is used by the Division of Apprenticeship Standards (DAS) for other industry sectors such as Retail Food, Machining, Automotive and Healthcare. ETP has been partnering with DAS to reach non-traditional apprenticeships.

This will be the second ETP Agreement with the UFCW Meat Trust. Funding is for Apprenticeship training only.

Employer Demand

According to the UFCW Meat Trust, signatory employers need Apprentices skilled in safe meat-handling consistent with Federal & Drug Administration (FDA) standards. Employers also require training in new technologies to better track inventory and reduce waste. In addition, employers need workers skilled in new equipment and techniques, responsive to changes in consumer demand.

Apprenticeship Program

The Panel is authorized to fund Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by DAS. ETP funding is designed to supplement the cost of delivery for the Related & Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. Depending on the type of trade, apprenticeship programs vary in length. In this case, the program is a one-year apprenticeship program. Normally, first-year Apprentices are not eligible due to the higher drop-out rates associated with the entry-level. With a one-year program as described here, that eligibility standard is waived.

For the trades, including Retail Food, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP funding does not displace Montoya Funds, Apprenticeship reimbursement is reduced by \$5.00, reducing the priority industry rate from \$18 to \$13 per hour. In addition, the Panel adopted a "blended rate" for Journeymen, reflecting the fact that they may be employed by a variety of contractors over the two-year term of contract ranging from large employers to small (≤ 100 employees). This is \$22 per hour, midway between the Priority Industry standard rate (\$18) and Small Business rate (\$26).

RSI is traditionally delivered as class/lab, and ETP does not reimburse CBT delivery for apprenticeship training. The curriculum is developed with input from DAS and a designated Local Education Agency (LEA), in this case, Hayward Center for Education and Careers. The Apprenticeship Program allows reimbursement for up to 200 hours of RSI plus OSHA 10, per-apprentice; however, the UCFW Joint Trust has not requested OSHA 10 training.

Under the Apprenticeship Training Program, the post-retention wage has been standardized to use the Special Employment Training (SET) wage. In this case, it is \$29.38 for a non-priority industry (Retail Food). In the event wages for Apprentices are below SET, as in this proposal, the Panel will recognize the union-negotiated wage.

PROJECT DETAILS

This is a one-year apprenticeship program, following a year of entry-level "meat clerk" training to learn the rudiments pertinent to one occupational specialty (Meat Cutter).

The Apprentices are all full-time permanent employees with a given signatory employer, such that on-the-job training totals 4,160 hours over the course of two years (including one year as a

Meat Clerk). Wages for both Apprentices and Meat Clerks are proportionate to Journeymen, with advancements at each six-month period. Related & Supplemental Instruction (RSI) begins in the second year, as noted above, after the meat clerk has been accepted into the apprenticeship program.

ETP will fund RSI, which is delivered as classroom training. Standard RSI for this program is 144 hours. However, ETP will also fund ancillary RSI, up to the 200-hour cap per-trainee. The training curriculum was developed with input from the national UFCW and the signatory employers.

Training Plan

Using a semester schedule, the RSI training will be delivered through the LEA at all six locations. The instructors are qualified Journeymen and experts per standards set by the LEA. The specific RSI class titles, for each of the training types shown below, are identified in the Exhibit B: Menu Curriculum.

Apprentice Training

Commercial Skills (100%): Meat Cutters will receive training on operational skills. Supermarket Math skills is necessary to help trainees understand gross/net profit and labor percentage. Safeway (not specific to Safeway Stores) will teach safety training, including working safely with knives/power equipment, proper lifting techniques and proper knife sharpening. A History of Sanitation course will be provide an overview of the history of government oversight of the meat industry including the handling and sanitary clean-up procedures.

Courses in meat Beef, Pork, Lamb and Veal will be delivered to properly inspect, grade, and cut meats and provide an overview of cooking/nutritional values. Sausage Making courses will be delivered to provide an overview of the types of sausages, casings, and cooking/nutritional values.

Seafood courses will provide an overview of farm-raised versus wild seafood. A Country of Origin Labeling (COOL) course will inform trainees of the labeling of seafood. An overview of cooking and nutritional values for seafood will be delivered, as well.

Impact/Outcome

Successful completion of the apprenticeship program will result in Journeymen status as certified by DAS.

Marketing and Support Costs

The UFCW Meat Trust will engage in outreach and recruitment activities with a special focus on increasing participation by ethnic minorities and women. The Trust will sponsor workshops, seminars and other informational meetings with assistance from employment and educational agencies.

The JAC's union and employer representatives will also participate in job fairs, school career days, and meetings with minority and women organizations. JAC representatives will explain the program's opportunities and assist with the "meat clerk" application process. Over the last five years, a 99% graduation rate for minorities and women was reported at the JAC's headquarters in Hayward.

The JAC includes the Employment Development Department (EDD), the Division of Apprenticeship Standards (District Offices) and the County Superintendent of Schools covering multiple counties and colleges. The JAC participated this month at an EDD workshop in Concord to recruit veterans. Even though the JAC is not including a Veterans component in this proposal, it plans to include veteran trainees within the next ETP Agreement.

Furthermore, the JAC regularly evaluates training by obtaining employer feedback, while revising the curriculum and other aspects of training as warranted through DAS. Staff recommends Support Costs of 8% for these purposes.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0924	Northern California	04/06/2015– 04/05/2017	\$125,100	\$99,207* (79%*)

*As of April 28, 2017, \$99,207 has been earned by the JAC. Based on ETP Systems, 9,373 reimbursable hours have been tracked, equivalent to 104% of the required hours. The Contractor projects final earnings of 100% based on training delivered through January 2017.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

N/A

Exhibit B: Menu Curriculum

Classroom/Lab Hours 8-200

Trainees may receive any of the following:

Commercial Skills

Supermarket Math

- Understanding Gross/Net Profit and Labor Percent

• Safeway (not specific to Safeway Stores)

- Working Safely with Knives and Power Equipment
- Proper Lifting Techniques
- Proper Knife Sharpening

History of Sanitation

- The Jungle (History of Government Oversight)
- HACCP (Hazard Analysis & Critical Control Points)
- Proper Clean-Up Procedures

Beef

- Inspection and Grading Breeds of Cattle
- Proper Beef Cuts
- Cooking and Nutritional Values

Pork

- Changes in the Pork Industry
- Proper Pork Cuts
- Cooking and Nutritional Values

Lamb and Veal

- Distinguishing Lamb from Veal
- Proper Lamb/Veal Cuts
- Cooking and Nutritional Values

Sausage Making

- History
- Types of Sausages
- Castings
- Cooking and Nutritional Values

Seafood

- Farm Raised vs. Wild
- COOL (Country Of Origin Labeling)
- Cooking and Nutritional Values

<p>Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.</p>
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Training Proposal for:
California Manufacturers and Technology Association

Agreement Number: ET18-0107

Panel Meeting of: June 23, 2017

ETP Regional Office: Sacramento

Analyst: J. Lazarewicz

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate SB <100 Entrepreneurial Veterans HUA SET	Industry Sector(s):	Manufacturing Technology/IT Aerospace and Defense Biotechnology/Life Sciences Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Statewide	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	≤20%		

FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$888,168		\$61,817 8%		\$949,985

In-Kind Contribution:	50% of Total ETP Funding Required	\$1,300,000
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Cont. Imp., HazMat, Mgmt. Skills, Mfg. Skills, OSHA 10/30 PL-Mfg. Skills	480	8-200	0-60	\$808	\$16.16
				Weighted Avg: 42			
2	Priority Rate SB<100 Retrainee	Business Skills, Computer Skills, Cont. Imp., HazMat, Mgmt. Skills, Mfg. Skills, OSHA 10/30	425	8-90	0-45	\$889	\$16.16
				Weighted Avg: 32			
3	Retrainee SB<100	Business Skills, Computer Skills, Cont. Imp., HazMat, Mgmt. Skills, Mfg. Skills, OSHA 10/30	21	8-90	0-45	\$941	\$16.16
				Weighted Avg: 40			
4	Veterans Priority Rate Retrainee	Business Skills, Computer Skills, Cont. Imp., HazMat, Mgmt. Skills, Mfg. Skills, OSHA 10/30	14	8-200	0-60	\$619	\$16.16
				Weighted Avg: 24			
5	Retrainee	Business Skills, Computer Skills, Cont. Imp., HazMat, Mgmt. Skills, Mfg. Skills, OSHA 10/30	50	8-200	0-60	\$962	\$16.16
				Weighted Avg: 60			
6	Retrainee Priority Rate	Business Skills, Computer Skills, Cont. Imp., HazMat, Mgmt. Skills, Mfg. Skills, OSHA 10/30	99	8-200	0-60	\$770	\$16.16
				Weighted Avg: 40			
7	Retrainee Priority Rate SB<100	Business Skills, Computer Skills, Cont. Imp., HazMat, Mgmt. Skills, Mfg. Skills, OSHA 10/30	14	8-90	0-45	\$667	\$16.16
				Weighted Avg: 24			

8	Entrepreneurial SB<100 Priority SET	Business Skills, Computer Skills, Cont. Imp., HazMat, Mgmt. Skills, Mfg. Skills, OSHA 10/30	25	8-60	0-45	\$889	N/A
				Weighted Avg: 32			

Minimum Wage by County: Job Numbers 1-7: \$17.63 per hour in Alameda, Contra Costa, Marin, San Francisco, San Mateo, and Santa Clara Counties; \$16.96 per hour in Los Angeles County; \$17.22 per hour in Orange County; \$16.72 per hour in San Diego County; \$16.46 per hour in Sacramento County; and \$16.16 per hour in all other counties.

Job Number 8(SET/Entrepreneurial): No wage requirement

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

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

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

Occupation Titles	Wage Range	
Administrative Support 1	\$15.50 - \$45.50	25
Administrative Support 2	\$45.51 - \$65.00	30
Customer Service Representative 1	\$15.50 - \$44.55	50
Customer Service Representative 2	\$44.56 - \$74.00	60
Sales Staff 1	\$15.50 - \$44.55	25
Sales Staff 2	\$44.56 - \$74.00	10
Production Staff 1	\$15.50 - \$44.00	200
Production Staff 2	\$44.01 - \$74.00	150
Technician 1	\$15.50 - \$44.00	50
Technician 2	\$44.01 - \$74.00	25
Maintenance 1	\$15.50 - \$44.00	58
Maintenance 2	\$44.01 - \$74.00	25
Manager 1	\$18.00 - \$48.00	100
Manager 2	\$48.01 - \$78.01	100
Supervisor 1	\$18.00 - \$48.00	40
Supervisor 2	\$48.01 - \$78.01	65
Engineer 1	\$22.00 - \$52.00	50
Engineer 2	\$52.01 - \$81.00	25
Engineer 3	\$81.01 - \$95.50	10
Analyst	\$25.75 - \$50.00	20
Owner	N/A	10

INTRODUCTION

California Manufacturers and Technology Association (CMTA) (www.cmta.net) is a trade association representing a large number of California's manufacturing, processing, service, and technology-based companies. Headquartered in Sacramento, CMTA has worked closely with its member companies and ETP to implement successful work skills training programs for over 20 years. CMTA's comprehensive advocacy and educational initiatives seek to foster a business environment that will lead to the retention and creation of high-wage, high-skill jobs that will enhance the overall prosperity of California. CMTA promotes training programs and policies that help manufacturers achieve higher performance. This will be CMTA's fifteenth ETP-funded project and fourth in the past five years.

Need for Training

CMTA continues to serve member companies which need to improve productivity and efficiencies to remain competitive. In doing so, CMTA has identified the critical needs of these California companies. CMTA relies on training research from the National Association of Manufacturing to ensure the training plans developed are in line with the type of training required on a national level. Additionally, CMTA works with California Community College industry representatives, Economic Development Boards, and other industry associations to determine skills gaps in the local economy. Many industries have a high rate of technological change, and skill gaps have become increasingly wide.

In this proposal, CMTA will continue to collaborate with many of California's manufacturing companies including California craft breweries and distilleries. Within these industries, companies are experiencing significant growth and seek retraining to enhance employee skills. Additionally, to keep up with this growth and future business needs, companies are moving toward automated systems including Computer Numerical Control (CNC). New automation will require workers to receive technological and process improvement skills training necessary to be more efficient and productive. Furthermore, training will include new software products being implemented in the manufacturing sector such as AutoCAD, Simulation of Complex Design, and Cloud Computing.

CMTA's training plan will ensure businesses have the skilled workforce required to meet the needs of their clients and compete with foreign and domestic competitors. ETP-funded training will allow employers to bridge the skill gap of incumbent staff and respond to unique employer challenges and growth opportunities. As part of the training plan development, CMTA surveys members to discern local training requirements. Many participating employers have found it difficult to find qualified engineers, technicians, machine operators, and maintenance workers. Due to this need, CMTA has adjusted their training plan to include courses that are designed to improve the skills of these occupations to ensure the participating employers are fully staffed with skilled workers.

Veterans Program

The Panel has established a higher reimbursement rate and other incentives for training California veterans.

CMTA plans to train 14 Veterans (Job Number 4) who have served on active full-time duty in the Armed Forces. Veterans will receive a higher reimbursement rate of \$22 per hour.

PROJECT DETAILS

Training Plan

The proposed training will mainly target manufacturers; however, companies from the aerospace, defense, and technology industries may also participate. CMTA serves companies statewide, but the core employers are located primarily in the Los Angeles and Bay areas.

Business Skills (15%): Training will be delivered to all occupations to communicate effectively, understand of their industry, and improve business functions. Training will include communication, customer service, financial analysis, product knowledge, sales strategies and project management.

Computer Skills (10%): Training will be delivered to all occupations. Engineers, Production Staff, Analysts, Managers, Supervisors and Owners will receive training to become more efficient in enterprise resource planning software, database applications and Windows software applications. Engineers will also receive training in CAD/CAM software. Administrative Support will receive training in accounting software and will also receive training with Sales Representatives and Customer Service Representatives in intermediate and advanced Microsoft Office.

Continuous Improvement (30%): Training will be provided to all occupations to help reduce waste, increase efficiencies and improve quality. Training will include ISO training, Lean manufacturing, kaizen methodology, Six-Sigma, team problem solving and root cause analysis.

Hazardous Materials (3%): Training will be delivered to all manufacturing occupations. Staff will receive the skills necessary to ensure a safe work environment while working with dangerous materials.

Management Skills (10%): Training will be provided to Managers and Supervisors in leadership skills and managing change. Due to tough competition in the global economy, managers and supervisors must have the right training to allow them to keep the workforce engaged, productive and focused.

Manufacturing Skills (30%): Training will be provided to Production Staff, Technicians and Maintenance. As companies' upgrade equipment into a more automated environment, staff will learn new technological skills along with proper operating and maintenance techniques for equipment. Training will include blueprint reading, intensive brewing, hydraulics training, wiring, electronics training, welding fundamentals, CNC operating, and Programmable Logic Controllers.

Certified Safety Training (2%)

OSHA 10/30 training is a series of courses "bundled" by industry sector and occupation. It consists of 10 hours of classroom or CBT training for production, maintenance, and technician 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. OSHA 10/30 is not included in the 10% limitation on safety training.

Computer-Based Training

CMTA will provide Computer-Based Training (CBT). CBT courses will primarily consist of Tooling U online training (<http://www.toolingu.com/>). Small business that find it difficult to stop production to train may take advantage of Tooling U. This will allow for full production to continue as trainees can be individually taken off their job to participate in CBT. CBT hours are capped at 50% of total training hours per-trainee.

Productive Lab

Trainees may produce goods for profit as part of the Productive Laboratory (PL) training in the courses identified under the Curriculum. The instructor must be dedicated 100% of the time to training delivery during all hours of PL training.

As a participating employer under CMTA, Tri Tool Inc. (Tri Tool) will train approximately 10 Production Staff, Maintenance, Supervisors and Technicians on CNC and manual equipment operations. Since factory equipment cannot be reproduced in a classroom setting, PL training is necessary to ensure safety and production standards are being met. This training will be provided at a much slower pace than regular production with significantly higher defects as trainees gain proficiency. A subject matter expert will conduct training. The trainer will demonstrate how to use the equipment, then supervise trainees' use of the equipment. A department supervisor will certify trainee competency once training is completed.

Training will be under constant supervision with a 1:2 trainer-to-trainee ratio. Tri Tool has requested a 1:2 ratio because trainees typically work in groups of two when assigned to a machine. PL training will be capped at 60 hours per trainee.

Special Employment Training/Entrepreneurial

Trainees in Job Number 8 are funded under Special Employment Training (SET). In this job number, the participating employers will not be required to demonstrate out-of-state competition and are not subject to a post-retention wage requirement as all trainees will be considered Entrepreneurs.

High Unemployment Area

The 113 trainees in Job Numbers 6 and 7 work in a High Unemployment Area (HUA) with unemployment exceeding the state average by at least 25%. For facilities in HUAs, the Panel may modify the ETP Minimum Wage by up to 25% if post retention wages exceed the start-of-training wages. However, CMTA is not asking for a wage modification.

Training Hours Limitation

Currently, small businesses are capped at 60 hours of training per trainee. CMTA is requesting a modification to the cap to provide small businesses up to 90 hours of class/lab training per person for Job Numbers 2, 3 and 7. The additional hours are necessary to train employees on new equipment and software.

Commitment to Training

ETP funds will not displace the existing financial commitment to training. Training varies by participating employers and is both job specific and companywide. Large employers have well-established training programs that include courses such as orientation, basic job skills, employee diversity and supervisory law. Other employers are only able to provide government-mandated training such as safety, compliance, and sexual harassment prevention. Many of the participating employers do not have structured training programs due to budgetary constraints. Training for these companies is generally provided on an as needed basis and can often be delayed. ETP funding will expand industry specific training to upgrade employee skill sets.

Safety training is provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

Training will be delivered primarily at the participating employers' worksites, with some center-based classes for employers with similar training needs. CMTA has partnered with three training subcontractors to deliver training in Continuous Improvement, Business, Computer and Manufacturing Skills. Participating employers will also provide qualified trainers who will train their own employees.

CMTA has three full-time staff members assigned to conduct employer marketing and recruitment, training needs assessments, skill gap analysis, trainer recommendations and selection, class scheduling, and compliance with all ETP documentation and tracking activities.

Impact/Outcome

CMTA training will focus on Lean manufacturing, new technology, process improvement, effective communication, and certification training to standardize job skills and competencies. CMTA has partnered with the National Association of Manufacturers to implement a skills certification system, whose goal is to standardize competencies and basic skills. Training will provide employers with skilled workers for new production and growth opportunities.

Trainees may earn a National Institute for Metalworking Skills (NIMS) certification. The certification sets skill standards for the industry, certifies individual skills against the standards, and accredits training programs that meet NIMS quality requirements. In addition, Engineers may receive a Microsoft Certified Systems Engineer certification.

Marketing and Support Costs

CMTA markets to an extensive database of current and potential members. Marketing activities are done through newsletters, workforce development partnerships, community colleges, trade shows, telemarketing, direct mailing, and in-person visits.

CMTA is requesting 8% support costs for the cost associated with employer recruitment; employer worksite visits to determine training needs; curricula design and scheduling of training; and assisting employers with training plan implementation. Staff recommends the 8% support costs.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET16-0378	\$1,199,767	3/7/2016 – 3/6/2018	1,039	486	0

Based on ETP Systems, 51,195 reimbursable hours out of a potential 52,538 hours have been tracked with 97% of hours completed. The Contractor projects final earnings of 100% based on training currently committed to by employers.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0353	Sacramento	2/2/2015 – 2/1/2017	\$649,725	\$649,725 (100%)
ET14-0144	Sacramento	9/3/2013 – 9/2/2015	\$1,245,642	\$1,245,642 (100%)
ET12-0294	Sacramento	2/6/2012 – 2/5/2014	\$749,199	\$746,667 (99%)

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

Custom Corporate Communications in Redondo Beach will provide Continuous Improvement (Lean and Quality), Business and Computer Skills training for a fee of \$250,000.

Get Kaizened of San Ramon will provide Continuous Improvement (Lean and Six-Sigma) training for a fee of \$100,000.

Awareness Integrated Management of Roseville will provide Continuous Improvement (ISO) training for a fee of \$75,000.

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

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

8-200 (Jobs 1,4, 5, 6)

8-90 (Jobs 2, 3, 7) Trainees may receive any of the following:

8-60 (Job 8)

BUSINESS SKILLS

- Business Communication Skills
- Business Fundamentals
- Business Writing
- Communication Skills
- Cost Control
- Customer Service Skills
- Financial Analysis
- International Shipping
- Negotiating Skills
- Planning and Organization Skills
- Presentation Skills
- Product Knowledge
- Project Management
- Relationship Building through Sales and Service
- Sales Strategies
- Supply Chain Management
- Time Management Skills

COMPUTER SKILLS

- Accounting Software
- CAD/CAM
- Computer Skills for Equipment Maintenance
- Custom Programming
- Database Management Training
- Enterprise Resource Planning Software
- Intermediate and Advanced Microsoft Office

CONTINUOUS IMPROVEMENT

- Benchmarking
- Building Successful Teams
- Interpreting and Analyzing Data
- ISO Training
- Leadership Skills for Front-Line Workers
- Lean Manufacturing
- Kaizen Methodology
- Performance Management
- Problem Solving and Decision Making
- Root Cause Analysis
- Six-Sigma
- Standard Work (Lean Process)
- Statistical Process Control
- Team Problem Solving
- Train-the-Trainer

HAZARDOUS MATERIALS

- Ammonia Training
- Hazardous Materials Handling, Storage and Clean-Up

MANAGEMENT SKILLS (Managers/Supervisors Only)

- Leadership Skills
- Managing Change

MANUFACTURING SKILLS

- American Welding Society Certified Welder
- Assembly Procedures
- Blueprint Reading
- Brewing Basics
- Certified Manufacturing Engineer
- Certified Manufacturing Technologist
- Certified Quality Engineer
- Cicerone Certification Training
- CNC Operator Certificate
- Cross-Training in Equipment/Production
- Electronics Training
- Equipment Maintenance
- Equipment Operations
- Forklift Training
- Good Manufacturing Practices
- Hydraulics Training
- Industrial/Shop Math
- Introduction to Practical Brewing
- Intensive Brewing
- Job Instruction/Analyzing Jobs for Efficiency
- Motor Controls
- National Institute for Metalworking Skills Certification Training
- Pneumatics
- Production Operation
- Programmable Logic Controllers
- Science for Practical Brewing
- Warehouse Operations and Distribution
- Welding Fundamentals
- Wiring

OSHA 10/30 (Certified OSHA Instructor)

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

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

Productive Lab Hours

0-60

MANUFACTURING SKILLS (Ratio 1:2)

- CNC Mills and Lathes
- CNC Operator Certificate
- Electro Arc Machine
- Honing Machine
- Manual and CNC Grinding Equipment
- Manual Mills and Lathes
- Portable Machine Equipment
- Welding Machines

CBT Hours

0-60

BUSINESS SKILLS

- Quality and Customer Service 175 (1.5 hours)
- Essentials of Communication 120 (1.5 hours)
- Basics of Manufacturing Costs 140 (1.5 hours)
- Intro to Managerial Accounting 145 (1.5 hours)
- Conflict Resolution Principles 150 (1.5 hours)
- Conflict Resolution for Different Groups 155 (1.5 hours)
- Franklin Covey: Business Acumen (1 hour)
- Franklin Covey: Communication Skills (1 hour)

COMPUTER SKILLS

- CAD/CAM Overview 160 (1.5 hours)
- Parts Software 150 (1.5 hours)
- Creating a Turning Program 280 (1.5 hours)
- Turning Calculations 285 (1.5 hours)
- Creating a Milling Program 290 (1.5 hours)
- Milling Calculations 295 (1.5 hours)
- Canned Cycles 310 (1.5 hours)
- Creating an EIA/ISO Program for the Mazak Mill 286 (1.5 hours)
- Creating an EIA/ISO Program for the Mazak Lathe 287 (1.5 hours)
- Creating a Mazatrol Program for the Mill 288 (1.5 hours)
- Creating a Mazatrol Program for the Lathe 289 (1.5 hours)
- Mazak Mill: Program Execution 290 (1.5 hours)
- Mazak Lathe: Program Execution 295 (1.5 hours)
- Mazak Mill: Program Storage 310 (1.5 hours)
- Mazak Lathe: Program Storage 315 (1.5 hours)
- Mazak Mill: First Parts Run 320 (1.5 hours)
- Mazak Lathe: First Parts Run 325 (1.5 hours)
- Inspecting with CMM's 220 (1.5 hours)
- Basic Programming 250 (1.5 hours)
- Networking for PLCs 270 (1.5 hours)
- Hand-Held Programmers of PLC's 280 (1.5 hours)
- PLC Diagrams and Programs 300 (1.5 hours)
- Overview of PLC Registers 305 (1.5 hours)
- PLC Program Control Instructions 310 (1.5 hours)
- Data Manipulation 360 (1.5 hours)

- Haas Mill: Program Execution 280 (1.5 hours)
- Haas Lathe: Program Execution 285 (1.5 hours)
- Haas Mill: Program Storage 310 (1.5 hours)
- Haas Lathe: Program Storage 315 (1.5 hours)
- Haas Mill: First Part Runs 320 (1.5 hours)
- Haas Lathe: First Part Runs 325 (1.5 hours)

CONTINUOUS IMPROVEMENT

- Essentials of Leadership 110 (1.5 hours)
- Personal Effectiveness 190 (1.5 hours)

MANAGEMENT SKILLS (Supervisors/Managers Only)

- Managing Performance: Best Practices 130 (1.5 hours)
- Team Leadership 160 (1.5 hours)
- Managing a Diverse Workplace 210 (1.5 hours)
- Manufacturing Management 180 (1.5 hours)
- Managing Practices for Total Quality 320 (1.5 hours)
- Franklin Covey: Conflict Management (1 hour)
- Franklin Covey: Managing Change (1 hour)

MANUFACTURING SKILLS

- Basics of the CNC Machining Center 130 (1.5 hours)
- Basics of the CNC Swiss-Type Lathe 135 (1.5 hours)
- CNC Coordinates 140 (1.5 hours)
- CNC Manual Operations 200 (1.5 hours)
- CNC Offsets 210 (1.5 hours)
- CNC Specs for the Mill 220 (1.5 hours)
- CNC Specs for the Lathe 225 (1.5 hours)
- Mazak Mill: Control Panel Overview 250 (1.5 hours)
- Mazak Lathe: Control Panel Overview 255 (1.5 hours)
- Mazak Mill: Safety for the Mill 260 (1.5 hours)
- Mazak Lathe: Safety for the Lathe 265 (1.5 hours)
- Mazak Mill: Locating Program Zero 270 (1.5 hours)
- Mazak Lathe: Locating Program Zero 275 (1.5 hours)
- Mazak Mill: Entering Offsets 280 (1.5 hours)
- Mazak Lathe: Entering Offsets 285 (1.5 hours)
- Basic Measurements 110 (1.5 hours)
- Linear Instruments Characteristics 115 (1.5 hours)
- Basics of the CMM 120 (1.5 hours)
- Basics of the Optical Comparator 130 (1.5 hours)
- Surface Measurement 140 (1.5 hours)
- Overview of Threads 150 (1.5 hours)
- Intro to Geometric Dimensioning & Tolerancing 200 (1994) (1.5 hours)
- Intro to GD&T 205 (2009) (1.5 hours)
- Calibration Fundamentals 210 (1.5 hours)
- Inspecting with Optical Comparators 230 (1.5 hours)
- Hole Inspection 240 (1.5 hours)
- Thread Inspection 250 (1.5 hours)
- Hardness Testing 260 (1.5 hours)
- Measuring System Analysis 300 (1.5 hours)

- Interpreting GD&T 310 (1994) (1.5 hours)
- Interpreting GD&T 315 (2009) (1.5 hours)
- Basics of the Manual Mill 110 (1.5 hours)
- Basics of the Engine Lathe 115 (1.5 hours)
- Overview of the Manual Mill Set-Up 200 (1.5 hours)
- Overview of the Engine Lathe Set-Up 205 (1.5 hours)
- Benchwork and Layout Operations 210 (1.5 hours)
- Manual Mill Operations 220 (1.5 hours)
- Engine Lathe Operations (1.5 hours)
- Hole Making on the Mill 230 (1.5 hours)
- Threading on the Engine Lathe 235 (1.5 hours)
- Taper Turning on the Engine Lathe 240 (1.5 hours)
- Metal Removal Process 110 (1.5 hours)
- Safety for Metal Cutting 115 (1.5 hours)
- What is Cutting? 120 (1.5 hours)
- Machines for Metal Cutting 130 (1.5 hours)
- Cutting Processes 140 (1.5 hours)
- Sawing Fundamentals 155 (1.5 hours)
- Intro to Screw Machining 160 (1.5 hours)
- Cutting Variables 200 (1.5 hours)
- Cutting Fluids 210 (1.5 hours)
- Band Saw Blade Selection 215 (1.5 hours)
- Cutting Tool Materials 220 (1.5 hours)
- Carbide Grade Selection 230 (1.5 hours)
- Tool Geometry 240 (1.5 hours)
- Milling Geometry 245 (1.5 hours)
- Drill Geometry 247 (1.5 hours)
- ANSI Insert Selection 250 (1.5 hours)
- Tool handlers for Turning 260 (1.5 hours)
- Speed and Feed Selection 300 (1.5 hours)
- Optimizing Insert Life 305 (1.5 hours)
- High-Speed Machining 310 (1.5 hours)
- Hard Turning 315 (1.5 hours)
- Machining Titanium Alloys 325 (1.5 hours)
- Intro to EDM 100 (1.5 hours)
- Intro to PLC's 200 (1.5 hours)
- Hardware for PLC's 210 (1.5 hours)
- Basics of Ladder Logic 220 (1.5 hours)
- Numbering Systems and Codes 230 (1.5 hours)
- PLC Inputs and Outputs 240 (1.5 hours)
- PLC Timers and Counters 260 (1.5 hours)
- Math for PLC's 320 (1.5 hours)
- Sequencer Instructions for PLC's 330 (1.5 hours)
- PLC Installation Practices 340 (1.5 hours)
- PID for PLC's 350 (1.5 hours)
- Shift Registers 370 (1.5 hours)
- Quality Overview 100 (1.5 hours)
- ISO 9000 Overview 110 (1.5 hours)
- Approaches to Maintenance 120 (1.5 hours)
- Lean Manufacturing Overview 130 (1.5 hours)

- Intro to Supply Chain Management 140 (1.5 hours)
- Total Productive Maintenance Overview 150 (1.5 hours)
- 5S Overview 155 (1.5 hours)
- Cell Design and Pull Systems 160 (1.5 hours)
- Intro to Six-Sigma 170 (1.5 hours)
- Troubleshooting: Identifying Problems 180 (1.5 hours)
- Troubleshooting: Understanding Cause and Effects 182 (1.5 hours)
- Troubleshooting: Taking Corrective Actions 184 (1.5 hours)
- Conducting an Internal Audit 200 (1.5 hours)
- SPC Overview 210 (1.5 hours)
- TS 16949:2009 Overview 220 (1.5 hours)
- Metrics for Lean 230 (1.5 hours)
- Process Flow Charting 240 (1.5 hours)
- Strategies for Set-Up Reduction 250 (1.5 hours)
- Approaches to Quality Management 255 (1.5 hours)
- Conducting Kaizen Events 260 (1.5 hours)
- Value Stream Mapping: The Present State 300 (1.5 hours)
- Value Stream Mapping: The Future State 305 (1.5 hours)
- Six-Sigma Goals and Tools 310 (1.5 hours)
- Product Design and Development 134 (1.5 hours)
- Product Design and Development 135 (1.5 hours)
- Production System Design and Development 136 (1.5 hours)
- Equipment/Tool Design and Development 137 (1.5 hours)
- Intro to Machine Rigging 110 (1.5 hours)
- Rigging Equipment 120 (1.5 hours)
- Lifting and Moving Equipment 130 (1.5 hours)
- Rigging Inspection and Safety 210 (1.5 hours)
- Rigging Mechanics 220 (1.5 hours)
- Blood Borne Pathogens 115 (1.5 hours)
- Personal Protective Equipment 120 (1.5 hours)
- Lockout/Tag Out Procedures 130 (1.5 hours)
- Safety for Lifting Devices 135 (1.5 hours)
- Machine Guarding 140 (1.5 hours)
- Hand and Power Tool Safety 145 (1.5 hours)
- Metalworking Fluid Safety 165 (1.5 hours)
- Noise Reduction and Hearing Conservation 170 (1.5 hours)
- Walking and Working Surfaces 180 (1.5 hours)
- Confined Spaces 190 (1.5 hours)
- Respiratory Safety 195 (1.5 hours)
- Powered Industrial Truck Safety 210 (1.5 hours)
- Math: Fundamentals 100 (1.5 hours)
- Math: Fractions and Decimals 105 (1.5 hours)
- Math: Units of Measurement 115 (1.5 hours)
- Basics of Tolerance 120 (1.5 hours)
- Blueprint Reading 130 (1.5 hours)
- Geometry: Lines and Angles 155 (1.5 hours)
- Geometry: Triangles 165 (1.5 hours)
- Shop Geometry Overview 170 (1.5 hours)
- Geometry: Circles and Polygons 185 (1.5 hours)
- Shop Algebra Overview 200 (1.5 hours)

- Trig: Pythagorean Theorem 205 (1.5 hours)
- Shop Trig Overview 210 (1.5 hours)
- Trig: Sine, Cosine and Tangent 215 (1.5 hours)
- Statistics 220 (1.5 hours)
- Trig: Sine Bar Applications 225 (1.5 hours)
- Interpreting Blueprints 230 (1.5 hours)
- Concepts of Calculus 310 (1.5 hours)
- Applied Engineering Sciences 110 (1.5 hours)
- Manufacturing Process Applications: Part I 124 (1.5 hours)
- Manufacturing Process Applications: Part II 125 (1.5 hours)
- Intro to Workholding 104 (1.5 hours)
- Supporting and Locating Principals 106 (1.5 hours)
- Locating Devices 107 (1.5 hours)
- Clamping Basics 108 (1.5 hours)
- Chucks, Collets and Vises 110 (1.5 hours)
- Fixture Body Construction 200 (1.5 hours)
- Drill Bushing Selection 230 (1.5 hours)
- Fixture Design Basics 210 (1.5 hours)
- Haas Mill: Control Panel Overview 250 (1.5 hours)
- Haas Lathe: Control Panel Overview 255 (1.5 hours)
- Haas Mill: Entering Offsets 260 (1.5 hours)
- Haas Lathe: Entering Offsets 265 (1.5 hours)
- Haas Mill: Locating Program Zero 270 (1.5 hours)
- Haas Lathe: Locating Program Zero 275 (1.5 hours)

HAZARDOUS MATERIALS

- Flammable/Combustible Liquids 155 (1.5 hours)
- SDS and Hazardous Communications 160 (1.5 hours)

Note: Reimbursement for retraining is capped at 200 total training hours per trainee in Job Numbers 1, 4, 5 & 6; capped at 90 total training hours in Job Numbers 2, 3 & 7; and capped at 60 total training hours in Job Number 8 regardless of the method of delivery. CBT is capped at 50% of total training hours, per trainee excluding OSHA 10/30, HAZWOPER or HAZMAT. PL is capped at 60 hours per-trainee.

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: CMTA

CCG No.: ET18-0107

Reference No: 17-0243

Page 1 of 6

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: 23 Bottles of Beer, LLC (Russian River Brewing Company)

Address: 1812 Ferdinand Court

City, State, Zip: Santa Rosa, CA 95404

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 40

Total # of full-time company employees worldwide: 81

Total # of full-time company employees in California: 81

Company: Advantage Metal Products

Address: 7855 Southfront Road

City, State, Zip: Livermore, CA 94551

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 40

Total # of full-time company employees worldwide: 105

Total # of full-time company employees in California: 105

Company: Andrews Air Corporation dba Mainfreight San Francisco

Address: 50 Tanforan Ave.

City, State, Zip: South San Francisco, CA 94080

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 40

Total # of full-time company employees worldwide: 90

Total # of full-time company employees in California: 90

Company: APEX Machining Inc.

Address: 1997 Hartog Dr.

City, State, Zip: San Jose, CA 95131

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 22

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

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: CMTA	CCG No.: ET18-0107
Reference No: 17-0243	Page 2 of 6

Company: Cambrian Homecare

Address: 5199 E. Pacific Coast Hwy., Ste. 100

City, State, Zip: Long Beach, CA 90804

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 45

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

Company: Clos Du Val Wine Company, Ltd.

Address: 5330 Silverado Trail

City, State, Zip: Napa, CA 94558

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 39

Total # of full-time company employees in California: 37

Company: Custom Pad & Partition, Inc.

Address: 1100 Richard Ave.

City, State, Zip: Santa Clara, CA 95050

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 76

Total # of full-time company employees in California: 76

Company: Denso Products and Services, Americas Inc.

Address: 3900 Via Ora Ave.

City, State, Zip: Long Beach, CA 90810

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 502

Total # of full-time company employees in California: 502

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: CMTA	CCG No.: ET18-0107
Reference No: 17-0243	Page 3 of 6

Company: HM Clause

Address: 555 Codoni Ave.

City, State, Zip: Modesto, CA 95357

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 80

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

Company: Imperial Rubber Products, Inc.

Address: 5691 Gates St.

City, State, Zip: Chino, CA 91710

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 24

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

Company: Industrial Automation Group

Address: 1349 Coldwell Ave., #B

City, State, Zip: Modesto, CA 95350

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: Industrial Electrical Company

Address: 1417 Coldwell Ave.

City, State, Zip: Modesto, CA 95350

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 175

Total # of full-time company employees in California: 175

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: CMTA	CCG No.: ET18-0107
Reference No: 17-0243	Page 4 of 6

Company: Jabil Packaging Solution

Address: 505 Main St.

City, State, Zip: Chula Vista, CA 91911

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 125

Total # of full-time company employees in California: 123

Company: Kuda Express Corp.

Address: 40577 Albrae St., #E

City, State, Zip: Fremont, CA 94538

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 15

Total # of full-time company employees in California: 15

Company: Littorai Wines

Address: 788 Gold Ridge Rd.

City, State, Zip: Sebastopol, CA 95444

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 6

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

Company: Mission Critical Composites

Address: 15400 Graham St., Ste. 102

City, State, Zip: Huntington Beach, CA 92649

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 35

Total # of full-time company employees in California: 35

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: CMTA

CCG No.: ET18-0107

Reference No: 17-0243

Page 5 of 6

Company: Newegg Inc.

Address: 16839 E. Gale Ave.

City, State, Zip: City of Industry, CA 91745

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 80

Total # of full-time company employees worldwide: 2,500

Total # of full-time company employees in California: 450

Company: Parallax Inc.

Address: 599 Menol Dr., Ste. 100

City, State, Zip: Rocklin, CA 95765

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 28

Total # of full-time company employees in California: 28

Company: Pitney Bowes – Presort Service Business Unit

Address: 250 Airport Circle, Ste. 101

City, State, Zip: Corona, CA 92880

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 80

Total # of full-time company employees worldwide: 14,907

Total # of full-time company employees in California: 334

Company: Pulmuone Foeeds USA, Inc.

Address: 2315 Moore Ave.

City, State, Zip: Fullerton, CA 92833

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 40

Total # of full-time company employees worldwide: 350

Total # of full-time company employees in California: 350

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: CMTA	CCG No.: ET18-0107
Reference No: 17-0243	Page 6 of 6

Company: Revive Brands dba Revive Kombucha and Revive Drinks

Address: 3900 Cypress Dr.

City, State, Zip: Petaluma, CA 94954

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 36

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

Company: Sonoma Beverage Works dba Sonoma Cider

Address: 30C Mill St.

City, State, Zip: Healdsburg, CA 95448

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 45

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

Company: Tri Tool Inc.

Address: 3041 Sunrise Blvd.

City, State, Zip: Rancho Cordova, CA 95742

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 40

Total # of full-time company employees worldwide: 140

Total # of full-time company employees in California: 118

Company: VM Services Inc.

Address: 1051 S. East St./6701 Mowry Ave.

City, State, Zip: Anaheim, CA 92805/Newark, CA 94560

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 13,000

Total # of full-time company employees in California: 350



**Panel Amendment #1 Proposal for:
Aleia Corp. dba Surplus Service
Agreement Number: ET17-0245**

Amendment Effective Date: March 21, 2017

ETP Regional Office: San Francisco Bay Area

Analyst: C. Hoover

CURRENT PROJECT PROFILE

Contract Type:	Priority/SB<100 Job Creation	Industry Sector(s):	Wholesale Trade Green Technology
Counties Served:	Alameda	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Priority Industry:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Current Contract Term:	October 11, 2016 to October 10, 2017	Substantial Contribution:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

CURRENT FUNDING

Current Funding
\$9,048

AMENDMENT FUNDING

Requested Funding	Total Funding
\$6,552	\$15,600

AMENDMENT TRAINING PLAN TABLE

Job No.	Job Description (By Contract Type)	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Priority/SB<100 Retrainee	Business Skills, Computer Skills, Continuous Impr	6	8-80	0	\$2,080	\$17.02
				Weighted Avg: 80			
2	Priority/SB<100 Job Creation	Business Skills, Computer Skills, Continuous Impr	2	8-60	0	\$1,560	\$15.00
				Weighted Avg: 60			

Minimum Wage by County: Job Number 1: \$17.02 per hour for Alameda County;

Job Number 2: \$14.69 per hour for Alameda County

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

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

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

Wage Range by Occupation	
Occupation Title	Wage Range
Job Number 2	
Administrative Staff	\$15.00 - \$30.00

INTRODUCTION

Established in 2011, Aleia Corp. dba Surplus Service (Surplus Service) is a green certified Small Business based in Fremont. The Company's services are referred to as Upcycling which provides green-sustainability solutions. This is Surplus Service's second ETP Agreement in the last five years.

AMENDMENT DETAILS

Surplus Service requests two types of amendments:

Job Number 1

Increase the maximum hours and weighted average hours from 60 to 80 for incumbent retrainees (Job Number 1). Most of the training in the Curriculum has been delivered. However, the Company has identified a need for more training in Computer Skills, such as Network Management, Customer Management System, and transitioning to the new Inventory Management (software).

Job Number 2

Add new trainees for Phase II training. The Company has hired two new employees (Administrative Staff) who will receive up to 60 hours of training: 40 hours of Business Skills (Team Culture and Implementing Company Trackers) training and 20 in Continuous Improvement (Customer Service). The addition of these trainees will increase the Agreement Amount by \$6,552.

Surplus Service submitted its amendment request (301R) on January 10, 2017, given that it had exhausted its funds in December. However, Staff needed to conduct an on-site Monitoring Visit (MV) to review rosters, observe training, and interview trainees. Due to scheduling conflicts, the MV meeting was delayed until March 21, 2017. Once held, the MV supported the need for additional funds. A retroactive effective date of March 21 is requested, which is when Surplus Service restarted its training for the monitor's observation. The Company will have until July 11, 2017 to complete training.

RECOMMENDATION

Staff recommends approval of this Amendment.

CURRENT CONTRACT PERFORMANCE

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

Agreement No.	Approved Amount	Term	No. Trainees Enrolled	No. Completed Training	No. Retained
ET17-0245	\$9,048	10/11/2016-10/10/2017	6	0	0

Training began on October 12, 2016, and the last date of training was March 21, 2017. With 348 hours (100%) recorded online, the training is ahead of schedule and funding is exhausted.

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

Job Number 1: 8-80

Job Number 2: 8-60

Trainees may receive any of the following:

BUSINESS SKILLS

- ✚ Team Culture
- ✚ Market Segments (Adopting Changes)
- ✚ Implementing Company Trackers (Managing Synchronization)
- ✚ Employee's Goals and Objectives
 - Preparation and Implementation

COMPUTER SKILLS

- ✚ E-Commerce
 - Analyzing E-Commerce Sites
 - Synchronizing Sites (New and Old)
 - Merging Sites into Core System
- ✚ Network Management
 - Improving Productivity (Central Server)
 - Local Area Networks (LAN)
 - Wide Area Networks (WAN)
 - Metropolitan Area Networks (MAN)
- ✚ Customer Management System
 - Customer Data Base (client data- payments, shipments, pickups)
 - Just-In-Time (JIT) Processes
 - Production Scheduling
 - Production Operations/Workflow
 - Process Improvement
 - Decision Making
 - Leadership Skills for Front-line Workers
 - Managing Customer Relations
 - Identifying Customer Needs
 - Telephone Skills
 - Handling Customer Requests
 - Resolving Customer Complaints
- ✚ Inventory Management (Software)
 - Inventory Management System
 - Transitioning (Old to New System)

CONTINUOUS IMPROVEMENT

- ✚ Customer Service
- ✚ E-Commerce Tools
 - Customer Relationship Regulations
- ✚ Communication Skills (Internal and External)

Note: Reimbursement for retraining is capped at **80 total training hours for Job Number 1** and **60 total training hours for Job Number 2** per trainee, regardless of the method of delivery.

DELEGATION ORDER



**Training Proposal for:
Alyn Industries, Inc. dba Electronic
Source Company**

Small Business

ET17-0497

Approval Date: May 15, 2017

ETP Regional Office: North Hollywood

Analyst: E. Wadzinski

CONTRACTOR

- Type of Industry: Manufacturing
- Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees
 - California: 70
 - Worldwide: 70
 - Number to be trained: 26
- Owner ☒ Yes ☐ No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 8%
- Repeat Contractor: ☒ Yes ☐ No

FUNDING

- Requested Amount: \$30,420
- In-Kind Contribution: \$30,303

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate SB <100	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills	26	8-60	0	\$1,170	\$16.96
				Weighted Avg: 45			

- Reimbursement Rate: \$26 SB Priority
- County(ies): Los Angeles
- Occupations to be Trained: Production Staff, Administrative Staff, Manager/Supervisor, Owner
- Union Representation: ☐ Yes
☒ No
- Health Benefits: \$1.18 per hour

SUBCONTRACTORS

- Development Services: Training Funding Source (TFS) in Seal Beach, assisted with development for a flat fee of \$1,900.
- Administrative Services: TFS will also provide administrative services for an amount not to exceed 13% of the payment earned.
- Training Vendors: N/A

OVERVIEW

Established in 1994 and located in Van Nuys, Alyn Industries, Inc. dba Electronic Source Company (ESC) (www.electronic-source.com) provides electronic manufacturing and services to aerospace, military, medical, and telecommunication and wireless industries. ESC's manufacturing services include New Product Introductions, Volume PCB Production, Materials Management, Box Build, Layout Services, Test Services, Over-molding and Conformal Coating.

This will be ESC's third ETP Agreement, and the second in five years. Under the prior agreement, training focused on becoming AS9100 (Aerospace) and ISO13485 (Medical) certification. Under this proposal, the certification courses will continue to be offered for cross-training, and updated standards. ESC has expanded into circuit card integration, which requires training on how to: test the new printed circuit board assemblies (PCBAs), integrate them with other PCBAs, and mechanically install them before shipping.

Training Plan

Class/lab training will be provided by in-house experts in the following:

Business Skills (25%): Training will be offered to all occupations in goal setting techniques to help organize production schedules, improve team building communication skills.

Computer Skills (25%): Training will be offered to all occupations in manufacturing software to improve reporting metrics and training to upgrade skills using Microsoft Office.

Continuous Improvement (25%): Training will be offered to all occupations in skills to eliminate waste and reduce lead times. Training will include AS 9100 updates to meet customer needs; and will provide staff with the basic understanding of process improvement techniques to effectively communicate with shop employees.

Manufacturing Skills (25%): Training will be offered to all occupations. This training will provide Production Staff with skills to improve quality processes. Administrative Staff will learn basic understanding of the manufacturing processes so they can effectively communicate with shop employees. This training will assist Managers and Supervisors support production demands.

Temporary to Permanent Hiring

ESC intends to train workers under Panel guidelines for the Temporary-to-Permanent program. The Company is planning to hire up to four temporary employees in Production and/or Administration. The Company may retain these employees on a temporary basis with the intention of hiring them into full-time, permanent positions after training. According to ESC the average time for “converting” temporary workers into full-time permanent employment is 3 - 5 months. It is expected that these workers will receive employer-paid share-of-cost for healthcare premiums while on temporary status, and upon hire into full-time permanent employment.

Under Panel guidelines for the Temporary to Permanent program, these trainees must be eligible to participate in ETP-funded training pursuant to Unemployment Insurance Code Section 10201(c). Moreover, they cannot be enrolled as trainees until after they have been hired by ESC 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.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0223	Van Nuys	08/04/14 - 08/03/16	\$23,400	\$23,400 (100%)

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

8-60

Trainees may receive any of the following:

BUSINESS SKILLS

- Accounting/Finance
- Business Writing
- Coaching & Communication
- Customer Service
- Goal Setting
- Inventory Control
- Leadership
- Product Knowledge
- Sales
- Teamwork

COMPUTER SKILLS

- Command Forecasting
- Estimating
- Manufacturing Execution Software
- Microsoft Office
- What if Queries

CONTINUOUS IMPROVEMENT

- AS 9100
- IPC Certification
- International Standards Organization 9001, 13485
- Lean Manufacturing
- National Aerospace and Defense Contractors Accreditation Program
- Problem Solving
- Process Flow/Mapping/Improvement
- Productivity Improvement
- Quality Improvement
- Sort, Systematize, Sweep, Standardize, Self-Discipline
- Takt Time Studies
- Value Stream Mapping

MANUFACTURING SKILLS

- Automated Optical Inspection and Programming
- Documentation Control
- Engineering Drawing Reading
- Electro Static Discharge
- Equipment Operation, Maintenance & Troubleshooting
- Good Manufacturing Processes
- Hardware Identification and Installation
- Inspection Techniques
- Material Requirements Planning
- National Aeronautics Space Admin Standard

- Parts Identification/Assembly
- Product Knowledge & Demonstration
- Repair Procedures
- Return Material Authorization
- Repairs
- Soldering to J-Std 001
- Surface Mount Technology
- Statistical Process Control

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

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

DELEGATION ORDER



**Training Proposal for:
ARO Pistachios, Inc.**

Small Business

ET17-0504

Approval Date: June 7, 2017

ETP Regional Office: Sacramento

Analyst: K. Smiley

CONTRACTOR

- Type of Industry: Agriculture
 - Number of Full-Time Employees
 - California: 45
 - Worldwide: 45
 - Number to be trained: 45
 - Out-of-State Competition: NAICS Code Eligible
 - Special Employment Training (SET): ☐ Yes ☒ No
 - High Unemployment Area (HUA): ☒ Yes ☐ No
 - Turnover Rate: 15%
 - Repeat Contractor: ☐ Yes ☒ No
- Priority Industry: ☒ Yes ☐ No
- Owner ☒ Yes ☐ No

FUNDING

- Requested Amount: \$35,100
- In-Kind Contribution: \$36,000

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate HUA	Business Skills, Computer Skills, Mfg. Skills, Mgmt. Skills, PL-Mfg. Skills	45	8-60	0-10	\$780	*\$12.12
				Weighted Avg: 30			

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

- Reimbursement Rate: \$26 SB Priority
- County(ies): Tulare
- Occupations to be Trained: Production Staff, Administrative Staff, Manager, Owner
- Union Representation: ☐ Yes
☒ No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: N/A
- Administrative Services: N/A
- Training Vendors: N/A

OVERVIEW

Founded in 2008 and located in Terra Bella, ARO Pistachios, Inc. (ARO) (<https://www.aropistachio.com>) is a full-service pistachio nut grower, processor and distributor to clients worldwide. The Company produces both ready-to-eat pistachios and ingredient pistachios used by pre-packaged food manufactures. The Company's customers include Trader Joe's, Sprouts, Marich, Bravo Farms and Plano Jerky. This will be ARO's first ETP Agreement.

Need for Training

ARO recently purchased several new pieces of machinery for \$750k. This includes water-efficient nut processing equipment and a Satake nut sorter. ARO has developed a detailed training plan to ensure trainees have the skills to efficiently and effectively operate this new equipment.

In addition to manufacturing training on equipment, ARO plans to deliver training to enhance productivity overall, as explained below.

Training Plan

Training will be provided via Class/Lab, Computer-Based Training and Productive Lab by in-house experts in the following:

Business Skills: Training will be offered to all occupations to enhance client satisfaction and leadership. Courses include Communication, Grower Relations, Leadership and Time and Task Management.

Computer Skills: Training will be offered to all occupations in use of internal programs and software. Courses include Salesforce, Shopify and Nutware Production and Inventory Software.

Manufacturing Skills: Training will be offered to Production Staff and Managers to use and maintain equipment. Courses include Food Safety Practices, Equipment Sanitation, Process Efficiency, Product Quality Improvements and Controls, Managing Inventory and Production Equipment. Courses will increase safety and production performance.

Management Skills: Training will be delivered to Managers to improve techniques and employee relation skills. Course topics will include leadership skills, team building, supervisory skills, performance measurement and accuracy.

Productive Laboratory

The Panel recently adopted regulations to authorize reimbursement for training delivered in a Productive Laboratory (PL) setting. PL trainees may produce goods for profit as part of the training in the courses identified under the Curriculum. The instructor must be dedicated to training delivery during all hours of training.

ARO will train 25 Production Staff and Managers on Electrical Systems, Optical Sorters, Packaging Equipment, Roasting Systems, Sealers and Scanners. This training will be at a much slower pace than regular production and will result in defects as trainees become proficient in the equipment. A subject matter expert will conduct training. The trainer will first demonstrate how to use the equipment and then supervise trainees using the equipment. The trainer will attest to the trainee's competency once training is completed.

Training will be provided at a 1:1 trainer-to-trainee ratio and is capped at 20 hours per trainee.

Modifications

Trainees work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%. The Company's location in Tulare County qualifies for HUA status under these standards.

For these trainees, the Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. ARO requests a wage modification from \$16.16 to \$12.12.

Commitment to Training

The Company's current training budget is approximately \$20,000 per year. Training programs include new hire orientation, sexual harassment prevention, safety and annual computer skills.

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

➤ Training Infrastructure

ARO's Communication Manager will oversee all administration. The Company has a training plan in place and is ready to begin training as soon as approved.

RECOMMENDATION

Staff recommends approval of this proposal.

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

8-60

Trainees may receive any of the following:

BUSINESS SKILLS

- Communication
- Grower Relations
- Leadership
- Time and Task Management
- Supplier-Chain Distribution Systems
- Performance Measurement and Accuracy
- Accounts Payable/Receivable
- Invoices
- Inventory Tracking

COMPUTER SKILLS

- Excel
- Word
- Shopify
- Salesforce
- Nutware Production and Inventory Software

MANUFACTURING SKILLS

- Good Manufacturing Practices
- Equipment Sanitation
- Standard Operating Practices
- Production Equipment
- Production Equipment Safety
- Safe Production Practices
- Product Quality Improvements and Controls
- Food Safety Practices
- Food Quality Practices
- Equipment Operations
- Forklift Training
- Industry Standards
- Process Efficiency
- Driver Training
- Managing Inventory

MANAGEMENT SKILLS

- Leadership Skills
- Team Building
- Supervisory Skills
- Performance Measurement
- Accuracy

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

Productive Lab

0-20

MANUFACTURING SKILLS (Ratio 1:1)

- Forklift
- Electrical Panels/Systems
- Optical Sorters
- Packaging Equipment
- Roasting Machinery
- Pistachio Scanners
- Sorting Procedures and Parameters of Grade Distinctions
- Sealer Machinery

CBT Hours

0-10

COMPUTER SKILLS

- Plug-In Application (1 hour)
- Customer-Response Modules (1 hour)
- Nutware Production and Inventory Software (1 hour)
- Using E-Commerce Effectively (1 hour)
- Excel (1 hour)
- Microsoft Word (1 hour)
- Operating Equipment Devices (1 hour)
- Outlook365 (1 hour)
- QuickBooks (1 hour)
- Shopify (1 hour)

<p>Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery. CBT is capped at 50% of total training hours, per-trainee. PL is capped at 20 hours per-trainee.</p>

DELEGATION ORDER



**Training Proposal for:
Bassenian Lagoni**

Small Business

ET17-0503

Approval Date: June 1, 2017

ETP Regional Office: San Diego

Analyst: J. Davey

CONTRACTOR

- Type of Industry: Services
Architectural
Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees
California: 96
Worldwide: 96
Number to be trained: 96
Owner ☒ Yes ☐ No
- Out-of-State Competition: Competitors Outside CA
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 12%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: \$99,840
- In-Kind Contribution: \$152,256

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	96	8-60	0	\$1,040	\$18.00
				Weighted Avg: 40			

- Reimbursement Rate: \$26 SB Priority
- County(ies): Orange
- Occupations to be Trained: Administrative Staff, Architect, Designer, Drafter, Operations Staff, Owner, Principal
- Union Representation: ☐ Yes
☒ No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: Welsh Advisors, Anaheim, assisted with development services for a flat fee of \$11,838.
- Administrative Services: Welsh Advisors will also provide administration services for a fee not to exceed 13% of payment earned.
- Training Vendors: N/A

OVERVIEW

Headquartered in Newport Beach and incorporated in 1979, Bassenian Lagoni (Bassenian) is a architectural firm that serves a variety of residential and commercial developers, custom-residential homeowners, hospitality and entertainment clients. Services include master planning, urban design, mixed-use development and interior design. The Company also maintains a facility in Shanghai, China.

Now building standards and regulations have triggered changes in the Company's design process. Nearly every phase of a project, from the initial design phase to the completion of construction, must be modified to accommodate these changes and remain compliant. The most current set of code changes took effect at the beginning of this year. These changes affect electrical vehicle charging; energy efficiency; and water efficiency requirements; and construction materials for pollution control.

According to the Company, reducing energy consumption and using “sustainable” structure designs is rapidly becoming the norm in the building industry. This requires Bassenian to revamp its business model to meet sustainability demands in all projects. Customers are asking for efficiency and sustainability in designs that are also aesthetically pleasing.

In summary, Bassenian’s employees need extensive training in building and construction standards, building codes, structural systems, design standards, CalGreen codes and standards, zero energy buildings, and the tools used to implement changing technology. In addition, some staff will receive training in Project Management and Leadership to work better together in project teams.

Most employees will also receive job-specific training in Computer Skills, including Adobe Creative Suite, InDesign, Photoshop, Bluebeam, Revit, 3Ds Max, Showcase, Navisworks Simulate, and Sketchbook Designer. These skills are fundamental to the design process, and are used throughout each phase of a project.

Training Plan

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

Business Skills: Training will be offered to all occupations. Training includes Project Management and Leadership skills to work cohesively and efficiently in all departments.

Commercial Skills: Training will be offered to Architects, Designer, Drafter, Operations Staff, and Principals. Training includes new building and construction standards, codes and regulations, and design/drafting standards driven by sustainability and ecologically conscious practices, as well as the existing codes and regulations that are impacted by these changes.

Computer Skills: training will be offered to all occupations. Some trainees require training in applications they are unfamiliar with that are used extensively, while others require training in new updates and releases.

Training Infrastructure

The Chief Financial Officer and five assistants will administer the ETP training program, with assistance from Welsh Advisors. A Manager from each department (design, drafting, architecture and operations) will ensure that all training is properly tracked and the rosters maintained.

RECOMMENDATION

Staff recommends approval of this proposal.

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

8 – 60 Trainees may receive any of the following:

BUSINESS SKILLS

- Project Management
- Leadership Skills

COMMERCIAL SKILLS

- Building and Construction Standards
- Design Standards
- Design Trends
- CalGreen Codes
- Zero Energy Buildings
- Product Knowledge

COMPUTER SKILLS

- OpenAsset
- Drafting Standards
- Revit, AutoCAD
- SketchUp

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

DELEGATION ORDER



**Training Proposal for:
Birdi & Associates, Inc.**

Small Business

ET17-0498

Approval Date: May 18, 2017

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

CONTRACTOR

- Type of Industry: Manufacturing
Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees
California: 49
Worldwide: 49
Number to be trained: 49
Owner ☒ Yes ☐ No
- Out-of-State Competition: Competitors Outside CA
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 17%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: \$44,590
- In-Kind Contribution: \$53,634

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 Priority Rate	Business Skills, Computer Skills, Cont. Imp., OSHA 10/30, Literacy Skills	49	8-60	0	\$910	*\$16.96
				Weighted Avg: 35			

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

- Reimbursement Rate: \$26 SB Priority
- County(ies): Los Angeles, San Diego
- Occupations to be Trained: Administration, Technician, Engineer, Programmer/Developer, Marketing, IT, Graphic Designer, Proposal Writer, System Estimator, Manager, Owner
- Union Representation: ☐ Yes
☒ No
- Health Benefits: \$1.96 per hour

SUBCONTRACTORS

- Development Services: JTS LLC (JTS) in Los Angeles assisted with development for a flat fee of \$3,675.
- Administrative Services: JTS will also perform administrative services for a fee not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

OVERVIEW

Founded in 2006, Birdi & Associates, Inc. (B&A), (www.birdi-inc.com) is a full-service systems engineering firm providing technology solutions to major airports and other transportation entities. B&A's advanced systems engineering capabilities allow them to provide services in areas of commissioning and activation, project management, systems integration, and software development. The Company also provides security systems. Customers include Los Angeles World Airports, Ontario Airport, San Diego International Airport, Metro and Union Station, City of Los Angeles, Port of Los Angeles, Santa Monica Airport and Long Beach Airport.

Headquartered in Pasadena, the Company operates from two other facilities in Los Angeles and San Diego. Employees from all three locations will participate in this training.

This is B&A's first ETP Agreement. Training will focus on three areas: Project Management, Security Systems and Software Development. The Company strives to improve its services, delivery processes, and customer service by developing in-house tools such as: Systems Facilities Operational Readiness, Capital Project Planner, Airport Security Assessment and Systems Commander. To date, B&A has designed, produced and installed approximately 24 wide range security systems.

Training Plan

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

Business Skills (25%): Training will be offered to all occupations and focus on Interpersonal Skills, Business Planning and Administration, Team Building, Customer Relations, Sales, Marketing and Negotiating Skills. Trainees will learn to resolve complaints, identify problems, and propose solutions that exceed customer expectations. These skills will make B&A more efficient, productive and profitable.

Literacy Skills (5%): Training will be offered to Technicians and Administration. This training will help them improve their job skills and overall performance and communicate more effectively with supervisors, co-workers and customers.

Computer Skills (30%): Training will be offered to all occupations in the Company's new software systems: VMWare Hypervisor, Linux, Microsoft SQL Database, Bluebeam software and Rivet. Trainees will learn to navigate and operate the Company new software systems. Training will also include the proper usage of software screens and functions for maximum benefit.

Continuous Improvement (25%): Training will be offered to Technicians, Graphic Designers, Programmer, Project Managers and Proposal Writers. Training includes key methods and practices used in a Continuous Improvement work environment. This will allow the Company to focus efforts in better customer service and product quality.

OSHA 10/30 (15%): Training will be offered to Technical Engineer, Programmer/Developer, IT, Graphic Designer and Senior System Estimator. OSHA 30 training will be provided to Managers/Supervisors to ensure a safe work environment.

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

Commitment to Training

B&A has an annual training budget of \$40,000 for mandatory training, employee orientation, basic safety training, 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

B&A is ready to start training upon project approval. The Company will provide an average of four hours of training per month for each employee within the next nine months. B&A has retained the services of Judith Training Services for ETP project administration and has assigned three personnel from Human Resources and Training Team department dedicated to scheduling and tracking the training and will function as the point of contact with ETP.

RECOMMENDATION

Staff recommends approval of this proposal.

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

8 – 60

Trainees may receive any of the following:

BUSINESS SKILLS

- Accounting
- Payroll
- Marketing
- Business Planning/Administration
- Financial Strategy
- Inventory Control
- Product Knowledge
- Leadership
- Decision Making
- Motivation
- Team Building
- Coaching Procedures
- Project Planning - Strategic Planning
- Monitoring
- Evaluations
- Business Report Writing and Editing
- Negotiating
- Conflict Management
- Interpersonal Skills
- Customer Relations, Needs, Requests
- Resolving Complaints
- Telephone Skills
- Business Performance

COMPUTER SKILLS

- Microsoft Office
- VMWare Hypervisor
- Linux
- Adobe
- Microsoft (Visio)
- Autodesk
- Auto Cad
- Quick Books
- Rivet
- Blue Beam
- SQL Data Base
- Computer-Assisted Design/Computer-Aided Manufacturing
 - Plotter Use
 - Graphic Representation
 - Auxillary Hardware
- Computer Networking (Hardware/Software)
 - Local Area Networks
 - Access Control Systems

- Video Managemnt Systems
- Security Systems
- Software Programming
- Wide (WAN)
- Metropolitan (MAN)
- Network Management
- Certified Novell Assistance
- Certified Network Engineer
- World Wide Web
- Designing and Developing Software and Applicatins
- Capital Project Planner
- Manufacturing Resource Planning MRP/ERP/SAP/Oracle
 - Integrated Material Management
 - Accounting Systems
 - Computerized Scheduling
 - Sales Forecasting
 - Material Resource Planning
 - Inventory Control
 - Purchase Order Tracking
 - Cost Accounting
 - Engineering/Document Control
 - Personnel
 - Payroll
 - General Accounting

CONTINUOUS IMPROVEMENT

- Statistical Process Control
 - Quality Control Methods
 - Interpreting Charts
 - Pareto
 - Histogram
 - Fishbone Diagrams
 - Statistical Analysis
- SQL Data Base Management
- Linux
- Problem Solving
- Quality Concepts
- Total Quality Management
- ISO – 9000- 9005
- Production Scheduling
- Production Operations/Workflow
- Process Improvement
- LAX Security Badge Training
- LAX Software Certification

OSHA 10/30 (Certified OSHA Instructor)

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

LITERACY SKILLS

- Vocational English
- Basic English Language Skills
 - Writing Letters and Business Reports
 - Reading Work Orders
 - Language Comprehension
 - Understanding Verbal Direction and Instruction

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

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

DELEGATION ORDER



Panel Amendment #1 Proposal for:
Brickley Construction Company Inc.
DBA Brickley Environmental
Agreement Number: ET17-0323

Amendment Effective Date: May 4, 2017

Approval Date: June 7, 2017

ETP Regional Office: North Hollywood

Analyst: M. Paccarelli

CURRENT PROJECT PROFILE

Contract Type:	SET Frontline - Retrainee SB<100 HUA Priority Rate	Industry Sector(s):	Construction Services
Counties Served:	San Bernardino	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Priority Industry:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Current Contract Term:	December 2, 2016 to December 1, 2017	Substantial Contribution:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

CURRENT FUNDING

Current Funding
\$64,896

AMENDMENT FUNDING

Requested Funding	Total Funding
+\$34,944	\$99,840

AMENDMENT TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	SET Frontline Priority Rate Retrainee SB<100	Continuous Imp; Computer Skills; HAZMAT; Hazwopper; OSHA 10/30 Literacy Skills	48	8-200	0-36	\$2,080	\$15.60
				Weighted Avg: 80			

Minimum Wage by County: \$15.60 in San Bernardino County

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

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

Up to \$1.60 may be added to meet the ETP minimum wage

Wage Range by Occupation	
Occupation Title	Wage Range
Project Manager	\$30.00 - \$34.00
Remediation Worker	\$14.00 - \$44.00
Remediation Leadmen	\$16.00 - \$46.00
Office Administrative Staff	\$15.00 - \$45.00
Worker Supervisor	\$21.00 - \$49.72
Owner	N/A

INTRODUCTION

Founded in 1983, Brickley Construction Company, Inc. dba Brickley Environmental (Brickley) is an environmental remediation contractor. The Company's goal is to provide safe and cost-effective solutions for the containment, abatement and removal of hazardous materials. Its customer base includes government, military facilities, schools, universities, hospitals, commercial buildings, single and multi-family residences.

AMENDMENT DETAILS

Brickley requests to increase the weighted average hours by another 28 hours to allow trainees to continue training. The additional funding will focus on new process training to support a recently-added business division.

In summary:

- The funding amount will increase by \$34,944 from \$64,896 to \$99,840.
- The weighted average hours in Job Number 1 will increase from 52 to 80.
- The average cost per trainee in Job Number 1 will increase from \$1,352 to \$2,080.

Brickley requests a retroactive effective date to May 4, 2017, the date of amendment request. There will be sufficient time remaining in the contract to complete the additional hours of training delivery.

RECOMMENDATION

Staff recommends approval of this Amendment.

CURRENT CONTRACT PERFORMANCE

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

Agreement No.	Approved Amount	Term	No. Trainees Enrolled	No. Completed Training	No. Retained
ET17-0323	\$64,896	12/02/2016-12/01/2017	48	0	0

To date, 2,057 eligible training hours have been tracked, equivalent to 82% of the current Agreement amount.

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

8-200 Trainees may receive any of the following:

CONTINUOUS IMPROVEMENT

- Office & Field Administrative Process Improvement
- Field Construction Process Improvement
- Lean Skills
- Team building
- Leadership skills
- Developing client relationships

COMPUTER SKILLS

- Microsoft Office (Excel, Word, Access)
- QuickBooks
- Estimating and Project Management Software
- Timesheet Estimating and Scheduling Software

OSHA 10/30

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

HAZARDOUS MATERIALS

- Environmental Management of Hazardous Materials
- Hazardous Material Handling

HAZWOPER

- HAZWOPER

LITERACY SKILLS

- Vocation English (Verbal and Written)

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

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

This cap does not apply to HAZMAT, OSHA 10/30 or HAZWOPER.

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



**TRAINING PROPOSAL FOR
Compass Health, Inc.
17-0608**

Delegation Order Date: 05/18/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Webb, Monique
Type of Proposal: Single Employer Contract (SE)
Funding Source: SET

FUNDING OVERVIEW:

TOTAL ETP FUNDING: \$56,250.00				
Training Cost	Admin Cost	Support Cost	Substantial Contribution	Total In-Kind
\$48,914.00	\$7,336.00	N/A	\$0.00	\$121,303.00

PROJECT PROFILE:

Repeat Contractor:	Yes			
Estimated Number of Trainees:	125	High Unemployment Area:	No	
No. of Employees: (Applicant)	State:1047 US:1047 WorldWide: 1047	Turnover Rate: (Applicant)	17.00%	

Industry Sector(s)	Priority Industry
Healthcare	Yes

FUNDING DETAILS:

Funding	Group No.	Attributes	Estimated No. of Trainees	Weighted Average Hours	Reimbursed Rate	Average Cost Per Trainee
SET	1	S-RET	125	25	\$18.00	\$450.00
		Total:	125			

TRAINING PLAN OVERVIEW:

Job Title	County of Workplace Location	Number of Trainees	Training Hours (Min-Max)	Wage Waiver	ETP Min Wage	Base Wage Range	Health Benefits Used	Contract Standard Min Wage
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Group #: 1	Attributes: S-RET					Reimbursement Rate: \$18.00		
LVN/RN	San Luis Obispo County	8	8-200	SET Wage	\$22.04	\$20.00 - \$41.00	\$2.05	\$29.38
LVN/RN	San Luis Obispo County	9	8-200	SET Wage	\$22.04	\$20.00 - \$41.00	\$2.05	\$29.38
LVN/RN	Santa Barbara County	8	8-200	SET Wage	\$22.04	\$20.00 - \$41.00	\$2.05	\$29.38
RN/LVN	San Luis Obispo County	8	8-200	SET Wage	\$22.04	\$20.00 - \$41.00	\$2.05	\$29.38
RN/LVN	San Luis Obispo County	9	8-200	SET Wage	\$22.04	\$20.00 - \$41.00	\$2.05	\$29.38
Therapists (Occupational, Physical, Speech)	San Luis Obispo County	2	8-200		\$29.38	\$39.00 - \$60.00	0.00	\$39.00
Therapists (Occupational, Physical, Speech)	San Luis Obispo County	3	8-200		\$29.38	\$39.00 - \$60.00	0.00	\$39.00
Therapists (Occupational, Physical, Speech)	San Luis Obispo County	4	8-200		\$29.38	\$39.00 - \$60.00	0.00	\$39.00
Therapists (Occupational, Physical, Speech)	Santa Barbara County	3	8-200		\$29.38	\$39.00 - \$60.00	0.00	\$39.00
Therapy Assistant (Occupational, Physical, Speech)	San Luis Obispo County	2	8-200	SET Wage	\$22.04	\$23.25 - \$51.50	\$2.05	\$29.38
Therapy Assistant (Occupational, Physical, Speech)	San Luis Obispo County	3	8-200	SET Wage	\$22.04	\$23.25 - \$51.50	\$2.05	\$29.38
Therapy Assistant (Occupational, Physical, Speech)	San Luis Obispo County	4	8-200	SET Wage	\$22.04	\$23.25 - \$51.50	\$2.05	\$29.38
Therapy Assistant (Occupational, Physical, Speech)	Santa Barbara County	3	8-200	SET Wage	\$22.04	\$23.25 - \$51.50	\$2.05	\$29.38

Legend of Attributes	
Code	Description
S	Single Employer Contract
RET	Retrainee

INTRODUCTION

Compass Health, Inc., (Compass Health), <http://www.compass-health.com> seeks ETP funding for retraining. Founded in 1986, the Company is headquartered in Grover Beach, CA. The Company also operates seven skilled nursing facilities and two assisted-living facilities throughout the Central Coast.

Compass Health serves the senior community throughout the central coast of California. The Company's mission is to offer specialized, professional skilled nursing and assisted living healthcare services without sacrificing personal concern and attention.

Compass Health does not face out-of-state competition. The project will be funded under Special Employment Training (SET).

Training will be conducted at the following location(s): Atascadero, Grover Beach, San Luis Obispo, Templeton

This is Compass Health's third project, the third in the last five years. The Company's previous ETP project focused on the adoption and implementation of a new Clinical Documentation System. This proposal will focus on the management and mastery of that system. Trainees will learn new coding processes to improve effectiveness of job tasks. Training will be delivered by experienced in-house instructors.

Products / Services

The Company's main products / services are:

Assisted living, medical, healthcare, and nursing services.

Customer Base

The Company's customer base includes:

The senior community located throughout the Central Coast of California. The company's mission is to provide specialized, professional skilled nursing and assisted living healthcare services.

PROJECT DETAILS

Purpose of Training

Compass Health seeks funding in order to provide training as follows:

The Institute on Aging reports approximately 40 million American's are now age 65 or older. In California alone, 4.3 million people are age 65+ (11.4 percent of the population, which is an 18 percent increase since 2000. By 2030, adults age 65 or older are expected to reach 20 percent of the entire population. The number of people requiring skilled nursing care could increase by 32,000, far exceeding available services. As a result, Compass Health anticipates an increase in patient residency over the next few years. To meet the growing and changing demands for senior care in the Central Valley, Compass Health needs to recruit healthcare workers who can provide effective care. Compass Health will need to train its workers accordingly.

New Processes/Systems

The Company is transitioning to the International Statistical Classification of Diseases and Related Health Problems 10th Revision (ICD-10), implemented on October 1, 2015. However, there are 75,000+ additional new codes proposed for an October 2017 release. The new diagnosis and procedure codes will enable greater specificity in service descriptions, and are expected to meet the increased level of detail needed to recognize advancements in medicine and technology. These updates will also bring improved quality to medical care facilities in the United States in line with non-U.S. practices. This is an industry-wide change and will require workforce training.

In addition, Compass Health must update staff skills to help with diagnoses and in-patient care. For example, the National Pressure Ulcer Advisory Panel (NPUAP) recently introduced new stages for patients suffering from pressure injury. These stages were revised based on questions from clinicians attempting to diagnose and identify stages of pressure injuries. This and other types of common injuries among the senior citizen population must be diagnosed and treated early.

Modification to Full-Time Employment

Compass Health requests a modification to the 35-hour minimum requirement for full-time employment. The Panel may approve a workload of less than 35 hours on a case-by-case basis. (Title 22, California Code of Regulations Section 4400(h).) Under the federal Affordable Care Act, a full-time employee is defined as any employee with an average of at least 30 hours of service per week. Additionally, according to the Compass Health Employee Handbook, "a minimum of 32 hours per week will be considered full-time." Occupations that may work less than 35 hours per week include Licensed Vocational Nurses, Registered Nurses, and Therapists. This full-time definition is customary for this industry and occupation. Staff recommends this modification to 32 hours.

TRAINING DETAILS

Medical Skills Training Program

This program provides funding for nurses and allied healthcare occupations with a Reimbursement Rate of:

- \$22 for clinical preceptor model
- \$18 for clinical didactic training

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.

Wage Modifications

The participating employers in group number 1 are in an industry sector designated for "priority funding" by the panel. These trainees qualify for a wage modification of up to 25% below the SET wage. The Company is requesting a wage modification from \$29.38 per hour to \$22.04 per hour.

Location	Substantial Contribution	Level Of Reduction
Compass Health, Inc.	\$0.00	0.00%
El Camino Real	\$0.00	0.00%
Bishop Street	\$0.00	0.00%
Farroll Ave	\$0.00	0.00%
South Elm	\$0.00	0.00%
Heather Court	\$0.00	0.00%
Teresa Drive	\$0.00	0.00%
Via Lucero	\$0.00	0.00%
Woodside	\$0.00	0.00%

TRAINING PLAN

The following types of training will be provided:

Training Curriculum		
Delivery Method - Type	Training Type	Training Level
Classroom/Simulated Laboratory	Business Skills	
Classroom/Simulated Laboratory	Computer Skills	Standard
Classroom/Simulated Laboratory	Continuous Improvement Skills	

Classroom/Simulated Laboratory	Medical Skills (didactic)	
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Turnover Rate

ETP funds training for stable, secure jobs. Employer's turnover rate cannot exceed 20% for the facility where training is requested, as measured in the 12 months during proposal development.

Turnover Rate		
Location	City	Turnover Rate Percent
Compass Health, Inc.	Grover Beach	0.00%
Farroll Ave	Arroyo Grande	0.00%
Teresa Drive	Morro Bay	0.00%
Via Lucero	Santa Barbara	0.00%
Woodside	San Luis Obispo	0.00%
South Elm	Arroyo Grande	0.00%
El Camino Real	Atascadero	0.00%
Heather Court	Templeton	0.00%
Bishop Street	San Luis Obispo	0.00%

SUBCONTRACTOR

Compass Health retained the below Admin SubContractor(s) to perform administrative services for a fee shown in the table and fee not to exceed 13% of the total earned amount.

Admin		
Subcontractor Name	City	Service Cost
Training Funding Partners	Fountain Valley	\$7,254.00

Compass Health retained the below Development SubContractor(s) to perform Development services for a flat fee of \$3,000.

Development		
Subcontractor Name	City	Service Cost
Training Funding Partners	Fountain Valley	\$3,000.00

PERFORMANCE

Active Contract

Below summarizes active contract(s) performance.

Agreement Number: ET15-0408

Location: Grover Beach

Term: 03/17/15-03/16/17

Approved amount: \$39,600

Projected earnings: \$39,600 = 100% of total contract amount

Based on ETP Systems, 1,042 reimbursable hours have been tracked for potential earnings of \$39,600 (100% of approved amount). All training and retention requirements have been completed for a total of 103 trainees. The closeout invoice has been submitted to ETP Fiscal and is currently being reviewed for approval.

Prior Performance

Below summarizes Contractor's performance under prior contract(s) completed within the last five years:

Agreement Number: ET13-0102

Location: Grover Beach

Term: 07/26/12-07/25/14

Approved amount: \$64,800

Earnings: \$36,965 = 57% of the total contract amount.

This prior agreement included multiple Compass Health locations across two counties. The Company was unable to properly maintain attendance rosters. Also, some trainees could not meet the ETP wage requirement.

Additionally, the Company found it difficult to deliver 24 hours of training to employees. As a result, training hours for more than 100 employees were not eligible for reimbursement.

RECOMMENDATION

Staff recommends approval of this proposal.



**TRAINING PROPOSAL FOR
Dean Hesketh Company, Inc.
17-0735**

Delegation Order Date: 05/18/2017
Regional Office: San Diego Regional Office
Analyst Name: Campion, Krista
Type of Proposal: Single Employer Contract (SE)
Funding Source: OSC

FUNDING OVERVIEW:

TOTAL ETP FUNDING: \$15,912.00				
Training Cost	Admin Cost	Support Cost	Substantial Contribution	Total In-Kind
\$13,837.00	\$2,075.00	N/A	\$0.00	\$21,723.00

PROJECT PROFILE:

Repeat Contractor:	No			
Estimated Number of Trainees:	18	High Unemployment Area:	No	
No. of Employees: (Applicant)	State:18 US:18 WorldWide:18	Turnover Rate: (Applicant)	10.00%	
Industry Sector(s)				Priority Industry
Manufacturing				Yes

FUNDING DETAILS:

Funding	Group No.	Attributes	Estimated No. of Trainees	Weighted Average Hours	Reimbursed Rate	Average Cost Per Trainee
OSC	1	S-RET	18	34	\$26.00	\$884.00
		Total:	18			

TRAINING PLAN OVERVIEW:

Job Title	County of Workplace Location	Number of Trainees	Training Hours (Min-Max)	Wage Waiver	ETP Min Wage	Base Wage Range	Health Benefits Used	Contract Standard Min Wage
Group #: 1	Attributes: S-RET					Reimbursement Rate: \$26.00		
Administrative	Orange County	2	8-60		\$17.22	\$15.06 - \$29.00	\$2.16	\$17.22
Owner	Orange County	2	8-60		\$17.22	\$40.00 - \$45.00	0.00	\$40.00
Production	Orange County	10	8-60		\$17.22	\$15.06 - \$35.00	\$2.16	\$17.22
Sales	Orange County	4	8-60		\$17.22	\$19.00 - \$45.00	0.00	\$19.00

Legend of Attributes	
Code	Description
S	Single Employer Contract
RET	Retrainee

INTRODUCTION

Dean Hesketh Company, Inc., (Photomation), seeks ETP funding for retraining. The Company, founded in 1955, is headquartered in Anaheim, CA, its only location.

Photomation meets the Panel's Out-of-State Competition (OSC) requirements.

Training will be conducted at the following location(s): Anaheim

Products / Services

Photomation designs, prints, and installs interior/exterior graphics and all types of signages. Its products include Décor Branding Acrylic Frames, Banners, Prints, Murals, Fleet/Vehicle Graphics Logos and Decals, retail signs, and Events/Trade Show banners and signs.

Customer Base

The Company's customer base includes:

Arenas & Stadiums, Automotive Industries, Banking and Financial Industries, Healthcare, Retail, Food Service/Restaurants, Trade Shows, Conventions & Festivals, and Custom Framing & Collectibles.

PROJECT DETAILS

Purpose of Training

Photomation seeks funding in order to provide training as follows:

In order to remain competitive and continue to grow, Photomation must provide the highest quality products at lower cost. To that end, Photomation plans to establish a formal training program that will improve skills and abilities so employees can work better, faster and smarter.

The need for training is also driven by the implementation of new accounting and printing software. The Company recently purchased a point-of-sale software, Cyrious Control Software. It will be used to track sales, orders, and costs; manage customer service and inventory; and process payments. Additionally, the Company recently purchased a new CNC Router to make signs and decorative art pieces.

TRAINING DETAILS

Location	Substantial Contribution	Level Of Reduction
Photomation	\$0.00	0.00%

TRAINING PLAN

The following types of training will be provided:

Training Curriculum		
Delivery Method - Type	Training Type	Training Level
Classroom/Simulated Laboratory	Business Skills	
Classroom/Simulated Laboratory	Computer Skills	Standard
Classroom/Simulated Laboratory	Continuous Improvement Skills	
Classroom/Simulated Laboratory	Hazardous Materials Skills	
Classroom/Simulated Laboratory	Manufacturing Skills (ME)	Standard

Turnover Rate

ETP funds training for stable, secure jobs. Employer's turnover rate cannot exceed 20% for the facility where training is requested, as measured in the 12 months during proposal development.

Turnover Rate		
Location	City	Turnover Rate Percent
Photomation	Anaheim	0.00%

SUBCONTRACTOR

Admin		
Subcontractor Name	City	Service Cost
Training Funding Source	Seal Beach	\$2,069.00

Photomation retained Training Funding Source in Seal Beach to assist with administration of this proposal for a fee not to exceed 13% of payment earned.

Photomation retained the below Development SubContractor(s) to perform Development services for a fee shown in the table and fee not to exceed \$950.00.

Development		
Subcontractor Name	City	Service Cost
Training Funding Source	Seal Beach	\$950.00

PERFORMANCE

Active Contract

N/A

Prior Performance

N/A

RECOMMENDATION

For the reasons set forth above, staff recommends approval.

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DELEGATION ORDER



Panel Amendment #2 Proposal for: Dauntless Industries, Inc. dba Dauntless Molds Agreement Number: ET17-0120

Amendment Effective Date: May 2, 2017

Approval Date: June 1, 2017

ETP Regional Office: North Hollywood

Analyst: M. Paccerelli

CURRENT PROJECT PROFILE

Contract
Type: Priority/SB<100
Retrainee

Industry
Sector(s): Manufacturing

Counties
Served: Los Angeles

Repeat
Contractor: ☒ Yes ☐ No

Union(s): ☐ Yes ☒ No

Priority
Industry: ☒ Yes ☐ No

Current Contract Term: July 1, 2016 to
June 30, 2018

Substantial
Contribution: ☐ Yes
☒ No

CURRENT FUNDING

Current Funding
\$47,840

AMENDMENT FUNDING

Requested Funding	Total Funding
+\$47,840	\$95,680

AMENDMENT 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	Priority Rate Retrainee SB<100	Mfg. Skills, Business Skills, Computer Skills, Cont. Imp., Literacy Skills,	23	8-200	0	\$4,160	\$16.48
				Weighted Avg: 160			

Minimum Wage by County: \$16.48 in Los Angeles County

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

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

Up to \$4.48 per hour may be added to meet the ETP minimum wage

Wage Range by Occupation	
Occupation Title	Wage Range
Production Staff	\$12.00 - \$37.00
Administrative Staff	\$12.50 - \$13.50
Manager/Supervisor	\$25.00 - \$45.00
Owner	N/A

INTRODUCTION

Founded in 1975, Dauntless Industries, Inc. dba Dauntless Molds (Dauntless) manufactures molds for the plastic industry. Dauntless has 41 years of experience in constructing high quality, low maintenance molds. This is the Company's third ETP Agreement in five years. The prior two Agreements had high earnings (100% and 97%).

AMENDMENT DETAILS

As explained in the original proposal, Dauntless implemented new processes and invested \$760K in equipment in 2016. This includes two new mold presses and a Septro S5-25 Robot. Training is not included in the purchase price of the new equipment.

Dauntless is requesting to increase its ETP funding by way of increasing the weighted average hours from 80 to 160. The Company has delivered enough training hours to exhaust all of its current funds. However, trainees still need more hours for in-depth learning on the new equipment and processes. This is a continuation of training for the same trainee population on the existing curriculum.

In summary:

- The funding amount will increase by \$47,840 from \$47,840 to \$95,680.
- The weighted average hours will increase from 80 to 160
- The average cost per trainee will increase from \$2,080 to \$4,160.

The effective date of this Amendment will be May 2, 2017, which is when the request for the amendment was submitted to ETP.

SUMMARIZE PRIOR MODS/AMENDS

- Revision 1: Revised the contract term to 07/01/16-6/30/18

RECOMMENDATION

Staff recommends approval of this Amendment.

CURRENT CONTRACT PERFORMANCE

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

Agreement No.	Approved Amount	Term	No. Trainees Enrolled	No. Completed Training	No. Retained
ET17-0120	\$47,840	7/1/2016 - 6/30/2017	26	0	0

To date, 1,840 eligible training hours have been tracked (100% of the current Agreement amount).

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

8 - 200

Trainees may receive any of the following:

MANUFACTURING SKILLS

- Cross-Training - Manufacturing Process
- Equipment Operation
- Tool Making
- Injection Mold Press
- Computerized Numerical Control (CNC)
- Computer-operated machinery

CONTINUOUS IMPROVEMENT

- Process Improvement
- ISO 9001
- Leadership Skills for Frontline Workers
- Production Operations/Workflow/Scheduling

COMPUTER SKILLS

- Manufacturing Resource Planning (MRP)
- Enterprise Resource Planning (ERP)
- Computer-Assisted Design/Computer-Aided Manufacturing (CAD/CAM)
- SolidWorks
- Autodesk
- Moldflow®
- Software Certifications
- Cimatron
- General Accounting

BUSINESS SKILLS

- Customer Service
- Communication Skills
- Project Management

Literacy Skills

- Basic math

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

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

DELEGATION ORDER



**Retrainee – Job Creation
Training Proposal for:
EMSolutions Inc.**

Small Business

ET17-0499

Approval Date: June 6, 2017

ETP Regional Office: San Francisco Bay Area

Analyst: L. Molinar

CONTRACTOR

- Type of Industry: Manufacturing
 - Number of Full-Time Employees
 - California: 17
 - Worldwide: 17
 - Number to be trained: 17
 - Out-of-State Competition: NAICS Code Eligible
 - Special Employment Training (SET): ☐ Yes ☒ No
 - High Unemployment Area (HUA): ☐ Yes ☒ No
 - Turnover Rate: 0%
 - Repeat Contractor: ☒ Yes ☐ No
- Priority Industry: ☒ Yes ☐ No
- Owner ☒ Yes ☐ No

FUNDING

- Requested Amount: \$19,890
- In-Kind Contribution: \$20,790

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate SB <100	Business Skills, Computer Skills, Cont. Imp., Manufacturing Skills, Literacy Skills, PL - Manufacturing	15	8-60	0	\$1,170	\$17.63
				Weighted Avg: 45			
2	Retrainee Job Creation Initiative Priority Rate SB <100	Business Skills, Computer Skills, Cont. Imp., Manufacturing Skills, Literacy Skills, PL - Manufacturing	2	8-60	0	\$1,170	\$15.50
				Weighted Avg: 45			

- Reimbursement Rate: Job #'s 1 & 2: \$26 SB Priority
- County(ies): Alameda
- Occupations to be Trained: Admin Staff, Owner/Executive, Production Staff, Quality Control, Supervisor/Manager, Engineer, Technical Support
- Union Representation: ☐ Yes
☒ No
- Health Benefits: Job #1: \$0.63 per hour

SUBCONTRACTORS

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

OVERVIEW

Founded in Fremont in 2007, EMSolutions Inc. (EMSolutions) (www.EMSolutionsTech.com) is an electronics manufacturing company that specializes in printed circuit board (PCB) assembly. Printed circuit boards are used to connect electronic components together in most computers and electronic devices. The Company provides rapid prototyping and production PCBs to customers in technology and device manufacturing, such as Seagate, TiVo, and BridgePoint Systems.

Need for Training

This will be EMSolutions' third ETP agreement and its second within the last five years. In the previous Agreement, EMSolutions added employees, new equipment, and a third production line. ETP-funded training allowed EMSolutions to train new and incumbent production workers on new machinery. Continuous Improvement training, such as ISO 9001, 5S Training, and Lean Manufacturing, was also provided.

Under this new proposal, EMSolutions will be focusing on improving its production capabilities and customer service in order to grow its customer base. EMSolutions primarily produces low volume prototypes. As such, the Company must be able to offer quick, transparent service to ensure a constant supply of orders. ETP-funded training will be designed to improve tracing for production progress, materials usage, and future needs.

EMSolutions is planning to expand production. To this end, it will provide cross-training, and implement process improvement initiatives. Training will include quality standards and performance management. Speed does not come at the cost of quality.

Expansion Plan

EMSolutions' lease is expiring in June 2017, and it is currently in negotiations for a larger facility in either Fremont or the San Francisco Bay Area. Some training will be provided at EMSolutions' current Fremont facility. After the move all training will be provided at the new facility. EMSolutions will notify ETP of the new location once identified.

The new facility will support additional Surface Mount Technology Pick and Place machines, to form a fourth production line. Once the new location is secured, EMSolutions will begin hiring additional employees. The Company has committed to hiring at least two new workers in this proposal (Job Number 2).

Training Plan

Training will be primarily delivered by the Company's subject matter experts, supplemented by training vendors yet to be determined. All training will be tracked on ETP approved rosters, and collected by the Administrative Assistant assigned to oversee ETP training. Training will be delivered as follows:

Business Skills (15%): Training will be provided to all occupations in Project Management, Communication Skills, and Customer Service, allowing EMSolutions to maintain and grow customer relationships. EMSolutions must maintain long-term relationships with a wide base of companies to ensure continued production demand, making this training essential to the companies continued growth.

Computer Skills (15%): Training will be provided to all occupations in Manufacturing Requirements Planning Software and Inventory Management, which will assist employees in tracking information and generating accurate data reports, leading to better quality control and better understanding of materials usage. Staff will also receive training on Purchase Order Tracking, Cost Accounting and Interpreting & Analyzing Data in order to better track production and more effectively meet client demands.

Continuous Improvement (20%): Training will be provided to all occupations in Quality Concepts, Just-in-Time Processes and Production Scheduling. This training will allow EMSolutions to quickly adjust to customers' different requirements and constantly evolving

designs, Continuous Improvement training will help the Company increase the production rate, reduce waste, and maintain quality.

Literacy Skills (10%): Training will be provided to select staff on Understanding & Communicating with Common Work-Related Instructions, Equipment Operation Terminology, and Documentation. Literacy Skills training will ensure that all employees are able to understand work-related instructions, communicate effectively, and respond to any issues that may arise.

Manufacturing Skills (20%): Training will be provided to Production Staff, Technical Support Staff, Quality Control Staff, and Managers on Equipment Operation, Assembly Procedures, and Inventory Control. By training employees on new equipment and new manufacturing techniques, EMSolutions will be able to continue manufacturing cutting edge circuit boards for technology companies. Employees will also be cross-trained on each position, promoting collaboration and allowing the Company to flexibly react to business demands. New employees will receive additional Equipment Operation and Assembly Procedures training as they learn the work skills required to succeed in the manufacturing industry.

Productive Lab – Manufacturing Skills (20%):

Productive Laboratory (PL) training is hands-on instruction or skill acquisition under the constant and direct guidance of a qualified trainer, offered in a productive work setting. PL is necessary in enabling trainees to fully apply and implement processes and techniques learned in a Class/Lab environment.

EMS Solutions is requesting up to 24 hours of PL per trainee. Training will be provided to Production Staff, Technical Support Staff, Quality Control Staff, and Managers on Equipment Operation, cementing the skills they have learned in the classroom. Trainees will gain the ability to operate, maintain, and troubleshoot new equipment. Training will be delivered at a 1:1 trainer-to-trainee ratio by an expert on each machine, who will be exclusively dedicated to instructing the trainee.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0327	Fremont, CA	11/15/2014 to 11/14/2016	19,682	\$16,289 (82.8%)

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

8-60 Trainees may receive any of the following:

BUSINESS SKILLS

- Business Performance
- Project Management
- Communication Skills
- Customer Service
- Sales
- Coaching
- Strategic Planning

COMPUTER SKILLS

- Manufacturing Requirements Planning (MRP) Software
- Enterprise Resource Planning (ERP) Software
- Interpreting & Analyzing Data
- Internet & Internet Security
- Purchase Order Tracking
- Inventory Management
- Cost Accounting
- Human Resources Software
- Engineering and Document Control

CONTINUOUS IMPROVEMENT

- Printed Circuit Board (PCB) Assembly and Electronics Manufacturing Quality Standards
- Quality Concepts
- Decision Making
- Production Scheduling
- Production Operations/Workflow
- Just-in-Time (JIT) Processes
- Process Improvement
- Leadership Skills
- Hazardous Analysis Critical Control Points (HACCP)
- Performance Management

LITERACY SKILLS

- Understanding & Communicating with Common Work-Related Instructions
- Equipment Operation Terminology
- Shop Floor Language
- Documentation – Issues and Actions

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

MANUFACTURING SKILLS

- Production Operations
- Equipment Operation
- Assembly Procedures
- Inventory Control
- Parts and Products Manufacturing
- Warehousing

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

Productive Lab Hours (1:1 Ratio)

0-24

MANUFACTURING SKILLS

- Equipment Operation
 - Surface Mount Technology (SMT) Printing Machine
 - SMT Pick and Place Machine
 - Wave Soldering Machine
 - Reflow Oven
 - Solder Pot Machine
 - Automated Optical Inspection (AOI) Machine
 - X-Ray and Microscope Diagnostics
 - Board Cleaning Machine

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.

DELEGATION ORDER



Training Proposal for:

Hologic, Inc.

Agreement Number: ET17-0505

Approval Date: June 7, 2017

ETP Regional Office: San Diego

Analyst: K. Campion

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee	Industry Sector(s):	Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Diego	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 1,100	U.S.:5,900	Worldwide: 6,400
<u>Turnover Rate:</u>	11%		
<u>Managers/Supervisors:</u> (% of total trainees)	18%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$82,080		\$0	\$0		\$82,080

In-Kind Contribution:	100% of Total ETP Funding Required	\$209,760
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Continuous Impr., Mfg. Skills, HazMat	114	8-200	0	\$720	\$16.72
				Weighted Avg: 40			

Minimum Wage by County: \$16.72 per hour – San Diego County

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

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

Up to \$1.72 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation

Occupation Titles	Wage Range	Estimated # of Trainees
Analyst (IS and Logistics)	\$23.00 - \$53.00	7
Chemist & Scientist I	\$23.00 - \$53.00	7
Chemist & Scientist II	\$54.00 - \$75.00	5
Project Specialist	\$23.00 - \$53.00	1
Quality Staff I	\$15.00 - \$38.00	16
Quality Staff II	\$39.00 - \$53.00	12
Supply Chain Staff	\$23.00 - \$53.00	7
Technician I	\$15.00 - \$45.00	20
Technician II	\$46.00 - \$70.00	18
Supervisor/Manager	\$39.00 - \$69.00	16
Sr. Manager	\$69.00 - \$89.00	5

INTRODUCTION

Founded in 1982, Hologic, Inc. (Hologic) (www.hologic.com) manufactures products for detecting human disease, such as the instrument platforms on which patient samples are tested. Other products include diagnostic and medical imaging systems, GYN surgical products, and medical aesthetic systems. Customers include hospitals, doctors' offices and laboratories.

Hologic's corporate headquarters are located in Massachusetts. The Company has two facilities in California: San Diego and Sunnyvale. However, the San Diego facility is where most training will take place. The San Diego facility's manufacturing focus is on Molecular Diagnostics, highly sensitive and specific tests for the early detection of sexually transmitted diseases (STIs).

Need for Training

Hologic's overall business goal is to expand through revenue growth and process improvement. To accomplish these goals, the Company will centralize products and replace semi-automated production with full automation. To do this, the Company will be upgrading equipment, and adding new production machines (e.g. Flow Wrapping for Collection Kits and High-Speed Transport Tube Fillers). Additionally, the Company will be implementing a new Lean Initiative to ensure quality goals are met.

Training Plan

All training will be delivered via Class/Lab by in-house trainers and vendors.

Business Skills (9%) – This training will be provided to all occupations. Trainees will learn report-writing skills to help with investigations of product or process issues to improve customer experience. Statistics & Analysis of Laboratory Data will enhance gathering and interpreting statistical data also to help with investigations.

Computer Skills (10%) – This training will be provided to all occupations to improve technical skills. Trainees will learn to effectively navigate and utilize new software applications in MS Visio, Oracle, Kinaxis (demand planning software), Salesforce (customer-centric sales software), Quik View (business metrics), Agile (change order software), Cornerstone Application Skills (learning management software) and MS Office. Specifically, Visio training will help workers create process maps, Value Stream Maps and other types of diagrams to support the Company's continuous improvement efforts.

Continuous Improvement (70%) – This training will be provided to all occupations. All trainees will be provided with a foundation in Lean concepts. Trainees will learn problem-solving techniques for manufacturing processes, Value Stream Mapping, Kaizen Events, quality training, and Medical Device and In-Vitro Diagnostics requirements. Project management training will help with manufacturing flow optimization. Some trainees will receive Frontline Leadership Essentials to help improve leadership skills of emerging leaders.

Manufacturing Skills (10%) – This training will be provided to Technicians and Quality Staff. Workers will be trained on new equipment and processes.

Hazardous Materials (1%) – This non-certified training will be provided to selected Technicians to help trainees learn methods for handling hazardous materials.

Commitment to Training

Hologic currently spends approximately \$50K to \$100K annually for training in new-hire orientation, GMP training, safety training, workplace harassment prevention, management skills and compliance. Additionally, some training has already been provided in the Foundations of Lean, quality and regulatory requirements training and some systems training.

ETP funds will help Hologic supplement current training to increase the technical skills of workers to help the Company meet strategic goals. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

The Director, Business Excellence will have program oversight of this training project and will be responsible for scheduling, delivery and record-keeping. The Company's operations and Senior Management is committed to this training project. The Company is ready to begin training immediately upon ETP approval.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

San Diego State University, the University of California at San Diego, and EMS Consulting in Carlsbad have been identified as delivering one or more modules of Lean Enterprises/Six Sigma Skills for a fee to be determined.

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

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- ✦ Investigations Writing
- ✦ Introduction to Finance (Zodiac Training)
- ✦ Statistics & Analysis of Laboratory Data
- ✦ International & National Shipping Requirements Skills

COMPUTER SKILLS

- ✦ Visio
- ✦ Oracle Training
- ✦ Kinaxis
- ✦ Salesforce.com
- ✦ LIMS (Laboratory Information Management System)
- ✦ QlikView
- ✦ Agile (EDMS)
- ✦ Cornerstone Application Skills
- ✦ MS Office (Intermediate & Advanced only)

CONTINUOUS IMPROVEMENT

- ✦ Value Stream Mapping
- ✦ Lean Enterprises / Six Sigma Skills
- ✦ Problem Solving
- ✦ Improvement and Coaching Kata
- ✦ American Society of Quality Certifications (ASQ)
- ✦ Supply Chain Management Skills & Certifications (APICS)
- ✦ Requirements Engineering Certification (CPRE)
- ✦ Regulatory Affairs Professional Certification (RAP) Medical
- ✦ Devices & In Vitro Diagnostics Requirements (MDF / IVDR)
- ✦ Developing an Engaged Workforce
- ✦ Managing in a High-Performance Organization
- ✦ Project Management
- ✦ Frontline Leadership Essentials

MANUFACTURING SKILLS

- ✦ Standard Work Processes
- ✦ Total Productive Maintenance
- ✦ High-Performance Teams
- ✦ Operator Maintenance Skills for Existing or New Equipment

HAZARDOUS MATERIALS

- ✦ Hazardous Materials Handling (non-certified)

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

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



**TRAINING PROPOSAL FOR
International Rubber Products, Inc.
17-0550**

05/25/2017

Panel Meeting Date:
Regional Office: San Diego Regional Office
Analyst Name: Hernandez, Kellen
Type of Proposal: Single Employer Contract (SE)
Funding Source: OSC

FUNDING OVERVIEW:

TOTAL ETP FUNDING: \$65,728.00				
Training Cost	Admin Cost	Support Cost	Substantial Contribution	Total In-Kind
\$56,460.00	\$9,268.00	N/A	\$0.00	\$250,212.73

PROJECT PROFILE:

Repeat Contractor:	No			
Estimated Number of Trainees:	41	High Unemployment Area:	No	
No. of Employees: (Applicant)	State:115 US:115 WorldWide:115	Turnover Rate: (Applicant)	7.00%	
Industry Sector(s)				Priority Industry
Manufacturing				Yes

FUNDING DETAILS:

Funding	Group No.	Attributes	Estimated No. of Trainees	Weighted Average Hours	Reimbursed Rate	Average Cost Per Trainee
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OSC	1	S-RET	36	86	\$18.00	\$1,548.00
	2	S-RET-JOBCREATION	5	100	\$20.00	\$2,000.00
		Total:	41			

TRAINING PLAN OVERVIEW:

Job Title	County of Workplace Location	Number of Trainees	Training Hours (Min-Max)	Wage Waiver	ETP Min Wage	Base Wage Range	Health Benefits Used	Contract Standard Min Wage
Group #: 1	Attributes: S-RET				Reimbursement Rate: \$18.00			
Accounting Clerk	Orange County	2	8-200		\$17.22	\$20.00 - \$40.00	0.00	\$20.00
Accounting Clerk	San Bernardino County	1	8-200		\$16.16	\$17.00 - \$17.00	0.00	\$17.00
Customer Service & Information Technology	San Bernardino County	1	8-200		\$16.16	\$24.23 - \$24.23	0.00	\$24.23
Customer Service Manager	San Bernardino County	1	8-200		\$16.16	\$19.23 - \$19.23	0.00	\$19.23
Engineering	Orange County	2	8-200		\$17.22	\$60.43 - \$68.27	0.00	\$60.43
Engineering	San Bernardino County	1	8-200		\$16.16	\$61.85 - \$61.85	0.00	\$61.85
Human Resources Manager	Orange County	1	8-200		\$17.22	\$31.25 - \$31.25	0.00	\$31.25
Jr. Engineer	Orange County	1	8-200		\$17.22	\$21.35 - \$21.35	0.00	\$21.35
Maintenance	Orange County	1	8-200		\$17.22	\$53.85 - \$53.85	0.00	\$53.85
Plant Manager	San Bernardino County	1	8-200		\$16.16	\$60.10 - \$60.10	0.00	\$60.10
Production Manager	Orange County	2	8-200		\$17.22	\$40.87 - \$48.08	0.00	\$40.87
Production Worker	Orange County	5	8-200		\$17.22	\$16.60 - \$21.35	\$1.10	\$17.70
Production Worker	San Bernardino County	3	8-200		\$16.16	\$15.06 - \$20.25	\$1.10	\$16.16

Production Worker	San Bernardino County	7	8-200		\$16.16	\$17.10 - \$35.10	0.00	\$17.10
Sales Staff	Orange County	1	8-200		\$17.22	\$24.04 - \$24.04	0.00	\$24.04
Sales Staff	Orange County	1	8-200		\$17.22	\$74.52 - \$74.52	0.00	\$74.52
Sales Staff	San Bernardino County	1	8-200		\$16.16	\$53.85 - \$53.85	0.00	\$53.85
Salesmen	San Bernardino County	2	8-200		\$16.16	\$25.00 - \$53.85	0.00	\$25.00
Supervisor	San Bernardino County	1	8-200		\$16.16	\$26.27 - \$26.27	0.00	\$26.27
Technology & Regulatory	Orange County	1	8-200		\$17.22	\$75.10 - \$75.10	0.00	\$75.10
Group #: 2	Attributes: S-RET-JOBCREATION					Reimbursement Rate: \$20.00		
Production Technicians	Orange County	2	8-200		\$14.35	\$17.25 - \$25.00	0.00	\$17.25
Production Technicians	San Bernardino County	1	8-200		\$13.22	\$13.25 - \$25.00	0.00	\$13.25
Production Technicians	San Bernardino County	2	8-200		\$13.22	\$16.25 - \$25.00	0.00	\$16.25

Legend of Attributes	
Code	Description
S	Single Employer Contract
RET	Retrainee
JOBCREATION	Job Creation – Retrainee Initiative Program

INTRODUCTION

International Rubber Products, Inc., (IRPI), <http://www.irpi.com> seeks ETP funding for retraining.

The company, founded in 1999, is headquartered in San Clemente, CA.

IRPI is a niche manufacturer of custom-molded rubber components. The Company operates three business units at two California locations: IRP Medical in San Clemente; and Abba Roller and Mikron Rubber in Ontario.

IRPI meets the Panel's Out-of-State Competition (OSC) requirements.

Training will be conducted at the following location(s): Ontario and San Clemente for all three business units.

Products / Services

The Company's main products/services include specialized rubber formulation/compounding, tool design, engineering, production, and assembly. Each unit's specialty is outlined below:

- IRP/Medical focuses on developing components used in medical devices that are made from liquid silicone rubber and processed via liquid injection molding.
- Abba Roller focuses on engineering tight tolerance rollers used in manufacturing, coating, laminating, and converting industries.
- Mikron Rubber specializes in rubber fabric reinforced diaphragms, metal-to-rubber bonded oil and gas parts as well as custom engineered molded parts for Original Equipment Manufacturers (OEM).

Customer Base

The Company's customer base includes the following industries: Aerospace, Medical, Industrial, Government/Military, Technology and Transportation.

PROJECT DETAILS

Purpose of Training

IRPI seeks funding in order to provide training as follows:

IRPI's customers demand quick turnarounds for new product development, and for increased production on short lead time. To satisfy customer demand, IRPI is investing in new equipment at a cost of some \$250,000. This will include Silicone Liquid Injection Molding equipment, Homogeneous Rubber Injection and Compression equipment, Plastic Injection Molding equipment and Additive Manufacturing (3D Printing) machinery.

The Company has committed to training staff in the higher skill levels needed to support

automated machines and robotics on the production floor. This means Production Staff and Engineers must have expertise in the use of specific computer programs. Training will include new software for laser inspection, dimensional inspection and Minitab statistic.

IRPI's investment in training is part of its strategy to transform staff into "Technicians" with an understanding of the technology used to produce custom-molded rubber products.

TRAINING DETAILS

Retrainee - Job Creation

This program provides incentives to companies that commit to hiring new employees including a higher Reimbursement Rate:

- \$20 for all delivery methods (Class/Lab; Productive Lab; E-learning).
- IRPI has committed to hiring 5 new employees. Trainees must be hired within the three-month period prior to Panel approval or during the term of contract. The Substantial Contribution requirement is waived. Also, a Turnover Rate penalty will not be assessed.

IRPI is expanding their workforce for the following reasons:
Expanded customer base, Expanded facility, Expanded product line, New equipment, New technology

Location	Substantial Contribution	Level Of Reduction
International Rubber Products, Inc.	\$0.00	0.00%
Abba Roller	\$0.00	0.00%
Mikron	\$0.00	0.00%

TRAINING PLAN

The following types of training will be provided:

Training Curriculum		
Delivery Method - Type	Training Type	Training Level
Classroom/Simulated Laboratory	Business Skills	
Classroom/Simulated Laboratory	Commercial Skills	Safety - General
Classroom/Simulated Laboratory	Computer Skills	Standard
Classroom/Simulated Laboratory	Continuous Improvement Skills	
Classroom/Simulated Laboratory	Manufacturing Skills (ME)	Standard
Productive Laboratory	Manufacturing Skills (ME)	Standard

Turnover Rate

ETP funds training for stable, secure jobs. Employer's turnover rate cannot exceed 20% for the facility where training is requested, as measured in the 12 months during proposal development.

Turnover Rate		
Location	City	Turnover Rate Percent
International Rubber Products, Inc.	San Clemente	8.00%
Abba Roller	Ontario	5.00%
Mikron	Ontario	8.00%

Productive Laboratory

Productive Laboratory (PL) trainees may produce goods for profit as part of the training, in the courses identified under the Curriculum. For PL the trainer-to-trainee ratio cannot exceed 1:1. The ratio may be lower, and maximum hours per-trainee are capped, as shown in the Curriculum.

IRPI requests 40 hours of PL training for Production Staff and Engineers. Trainees will be trained on various advanced manufacturing techniques and computer programs.

The PL trainer will be subject-matter experts who will instruct and deliver the course content and material. Trainers will be both in-house or outside training vendors with extensive experience in the processes and equipment being used for training.

SUBCONTRACTOR

None

PERFORMANCE

Active Contract

None.

Prior Performance

None.

RECOMMENDATION

For the reasons set forth above, staff recommends approval of this proposal.

DELEGATION ORDER



**Training Proposal for:
JBZ, Inc. dba JZMK Partners**

Small Business

ET17-0502

Approval Date: June 12, 2017

ETP Regional Office: San Diego

Analyst: J. Davey

CONTRACTOR

- Type of Industry: Services
Construction
Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees
California: 24
Worldwide: 24
Number to be trained: 23
Owner ☒ Yes ☐ No
- Out-of-State Competition: Competitors Outside CA
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 8%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: \$28,704
- In-Kind Contribution: \$47,842

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	23	8-60	0	\$1,248	\$18.00
				Weighted Avg: 48			

- Reimbursement Rate: Job #1: \$26 SB Priority
- County(ies): Orange
- Occupations to be Trained: Administrative Staff, Architect, Operations Staff, Principals
- Union Representation: ☐ Yes
☒ No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: Welsh Advisors, Anaheim - \$3,635
- Administrative Services: Welsh Advisors, Anaheim - final amount not to exceed 13% of earned funds
- Training Vendors: N/A

OVERVIEW

Established in 1960, and located in Costa Mesa, JBZ, Inc. dba JZMK Partners (JBZ) is a worldwide architectural firm that serves a variety of clients in diverse industries. The Company's services include feasibility studies, land use analysis, master planning, urban design, entitlement services, neighborhood planning, programming, design guidelines, site planning, architectural design, LEED sustainability studies, BIM modeling, construction documents, and construction services.

The building codes and regulations that govern the construction industry are continuously updated. These changes include construction standards and structural systems; LEED sustainability strategies; and CalGreen and zero energy standards. Every update impacts the design process. Many of these changes are driven by the demand for ecologically sound materials, sustainability, and carbon neutrality in building design and construction.

These changes require updated skills in the latest design and construction technology for many different types of buildings. Computer design application training will focus on Adobe Creative Suite, InDesign, Photoshop, Bluebeam, Revit, 3Ds Max, Showcase, Navisworks Simulate, and Sketchbook Designer. These tools are used throughout each phase of project design and development. Many of them are updated regularly, with new features and modules.

Another example of emerging technology is the implementation of “3D goggles” to provide clients with a fully immersive perspective pre-construction. This new way of presenting designs has also created a need for employee training.

Training will also be provided in accounting, communication skills, project management, leadership skills, and marketing in support of growth. JBZ expects its customer base to increase as it expands from boutique architecture to a mid-size firm.

Training Plan

All training will be conducted by internal trainers who have the required skills to conduct training, mostly Partners and Architects.

Business Skills: This training will be offered to all occupations. It is imperative for staff to have at least a fundamental grasp of the business, the needs and demands of its clients and the way the industry operates. Additionally, training in Project Management, Accounting, and Communication Skills will allow Administrative Staff to work cohesively with technical professionals and perform the job functions expected of them.

Commercial Skills: This training will be offered to all occupations. Architects will receive more extensive technical training in building and construction standards, building codes, structural systems, LEED, and design standards as it applies to each phase in a project. The remaining trainees will receive training one or more of the same skills, based on their occupational needs.

Computer Skills: This training will be offered to all occupations. Trainees will receive the most updated training in Computer Skills, such as Bluebeam Revu, Revit, 3D Max and other design software, as well as CRM, Accounting, and Adobe Creative Suite so they can use these tools to successfully create the designs and plans that are the basis of architectural work.

RECOMMENDATION

Staff recommends approval of this proposal.

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

8 – 60 Trainees will receive any of the following:

BUSINESS SKILLS

- Accounting
- Communication Skills
- Project Management
- Leadership
- Marketing
- Business Development

COMMERCIAL SKILLS

- Building and Construction Standards
- Building Codes
- Structural Systems
- Design Standards
- International Green Construction Code
- Leadership in Energy and Environmental Design (LEED) Sustainable Design Standards
- Cal Green Codes and Standards
- Zero Energy Buildings

COMPUTER SKILLS

- Customer Relationship Management (CRM)P Software
- Accounting Software
- Adobe Creative Suite (InDesign, Photoshop, etc)
- Bluebeam Revu
- Revit
- 3D Max
- Naviswork
- Sketchbook Designer

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

DELEGATION ORDER



**Retrainee - Job Creation
Training Proposal for:
Klean Kanteen, Inc.**

Small Business

ET17-0493

Approval Date: May 18 , 2017

ETP Regional Office: Sacramento

Analyst: K. Mam

CONTRACTOR

- Type of Industry: Manufacturing
- Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees
 - California: 62
 - Worldwide: 62
 - Number to be trained: 72
- 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: \$50,284
- In-Kind Contribution: \$56,908

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate SB <100	Business Skills, Computer Skills, Continuous Impr, Mgmt Skills, Mfg Skills	47	8-60	0-16	\$832	\$16.16
				Weighted Avg: 32			
2	Retrainee Priority Rate SB <100 HUA	Business Skills, Computer Skills, Continuous Impr, Mfg Skills	11	8-60	0-16	\$520	*\$12.12
				Weighted Avg: 20			
3	Retrainee Job Creation Initiative SB < 100	Business Skills, Computer Skills, Continuous Impr, Mgmt Skills, Mfg Skills	14	8-60	0-16	\$390	*\$13.22
				Weighted Avg: 15			

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

- Reimbursement Rate: Job #'s 1-3: \$26 SB Priority
- County(ies): Butte
- Occupations to be Trained: Sales Staff, Customer Service Staff, Manager, Administrative Staff, Operations Staff, Owner
- Union Representation: ☐ Yes
☒ No
- Health Benefits: Job #1: \$2.16 per hour; Job #3: \$1.10 per hour

SUBCONTRACTORS

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

OVERVIEW

Founded in 2004 and headquartered in Chico, Klean Kanteen, Inc. (Klean Kanteen) (www.kleankanteen.com) is a family-owned business that manufactures reusable and organic customized products such as stainless steel bottles, cups and tumblers. Products are sold worldwide in over 40 countries. Training under this proposal will be delivered at the Company's facilities and at Butte College.

Need for Training

This will be Klean Kanteen's second ETP-funded Agreement and the second within the last five years. The Company will continue its previous training plan of improving processes and employee skills so as to increase efficiencies and customer satisfaction. Some course topics in the Curriculum may be similar to courses in the prior Agreement. However, the courses have been modified and upgraded to account for new technologies.

The Company's new ERP system (SAGE) was included in training under the previous Agreement. For this Agreement, trainees will receive more advanced training to help them navigate the system. The Company is also continuing to add system modules to their existing Contact Resource Management (CRM) and Material Requirements Planning (MRP) software. New modules will help streamline the systems and improve processes. Training will be provided in these areas as well.

Klean Kanteen has also grown in recent years, creating a need for management positions. Providing effective leadership skills to all management staff is a critical element to the Company's continued growth.

Retrainee - Job Creation

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

Klean Kanteen recently moved to a bigger facility and plans to continue to hire employees. The Company has committed to hiring 14 new employees (Job Number 3). The Company will be hiring Sales/Customer Service Staff, Administrative Staff, Operations Staff, and Managers. 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.

Training Plan

Training will be delivered via Classroom/Laboratory, E-Learning 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 improve communication skills, increase proficiency and improve productivity. Training topics include Communication Skills, Customer Service Skills, and Developing Sales/Marketing Strategies.

Management Skills: Training will be offered to Managers and the Owner. Training will ensure new and existing managers are actively engaging, recognizing, coaching and mentoring their staff. Training topics include Collaborative Leadership, Maximizing Team Performance and Planning and Decision Making.

Computer Skills: Training will be offered to all occupations. Training will focus on data collection and analysis and training on the Company's new systems. Training topics include Customer Relationship Management, SAGE Material Resource Planning, and Human Resource Management.

Manufacturing Skills: Training will be offered to Operations Staff. Training will focus on equipment and warehousing operations. Training topics include Inventory Control, Warehousing, Production Equipment and Tools, and Sourcing, Forecasting & Logistics.

Continuous Improvement: Training will be offered to all occupations. Training will focus on improving production processes, solving problems, and making improvement to reduce waste and improve quality. Training topics include Maximizing Team Performance, Quality Inspection, and Process Improvement.

Computer-Based Training

CBT is capped at 50% of total training hours per trainee. CBT will be provided to supplement Class/Lab training and is a more convenient means of delivering basic training. Trainees in Job Numbers 1 -3 will receive up to 16 hours of CBT.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0337	Chico	11/24/14- 11/23/16	\$49,816	\$47,814 (96%)

Exhibit B: Menu Curriculum

Class/Lab Hours

8-60

Trainees may receive any of the following:

BUSINESS SKILLS

- 🚀 Conflict Management
- 🚀 Communication Skills
- 🚀 Customer Service Skills
- 🚀 Individual Contributor Development
- 🚀 Meeting Management
- 🚀 Time and Priority Management
- 🚀 Maximizing Strengths
- 🚀 Developing Sales/Marketing Strategies
- 🚀 Strategic Planning

COMPUTER SKILLS

- 🚀 Microsoft Office (Intermediate/Advanced)
- 🚀 Web-Ex for Meeting Management
- 🚀 Sales Forecasting
- 🚀 Sugar Customer Relationship Management
- 🚀 SAGE Human Resource Management
- 🚀 Employee Engagement Management
- 🚀 SAGE Material Resource Planning
- 🚀 SAGE Bill of Materials
- 🚀 SAGE Work Order
- 🚀 SAGE Warehouse Management System
- 🚀 Business to Business Processing

CONTINUOUS IMPROVEMENT

- 🚀 Managing Numbers
- 🚀 Maximizing Team Performance
- 🚀 Quality Inspections
- 🚀 Value Stream Mapping
- 🚀 Standard Operating Procedures
- 🚀 Quality System Management
- 🚀 Process Improvement
- 🚀 Logistics
- 🚀 Inventory Control

MANAGEMENT SKILLS (management trainees only)

- 🚀 Collaborative Leadership
- 🚀 Maximizing Team Performance
- 🚀 Performance Management
- 🚀 Giving and Receiving Feedback
- 🚀 Project Management
- 🚀 Planning and Decision Making
- 🚀 Time Management

MANUFACTURING SKILLS

- 🚧 Inventory Control
- 🚧 Warehousing
- 🚧 Sourcing, Forecasting & Logistics
- 🚧 Production Equipment and Tools
- 🚧 Cross-Training
- 🚧 Cylindrical Screen Print Machine
- 🚧 Cylindrical Laser Etch Machine

CBT Hours

0-16

BUSINESS SKILLS

- 🚧 Business Acumen (2 hours)
- 🚧 Individual Contributor Development (4 hours)
- 🚧 Maximizing Strengths (4 hours)

COMPUTER SKILLS

- 🚧 Adobe Illustrator (Intermediate/Advanced) (6 hours)

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery. CBT is capped at 50% of total training hours, per trainee.

DELEGATION ORDER



**Training Proposal for:
Murphy, Murphy & Murphy, Inc.**

Small Business

ET17-0501

Approval Date: May 18, 2017

ETP Regional Office: San Diego

Analyst: J. Davey

CONTRACTOR

- Type of Industry: Financial Services
 - Number of Full-Time Employees
 - California: 45
 - Worldwide: 45
 - Number to be trained: 45
 - Out-of-State Competition: Competitors Outside CA
 - Special Employment Training (SET): ☐ Yes ☒ No
 - High Unemployment Area (HUA): ☐ Yes ☒ No
 - Turnover Rate: 2%
 - Repeat Contractor: ☐ Yes ☒ No
- Priority Industry: ☐ Yes ☒ No
- Owner ☒ Yes ☐ No

FUNDING

- Requested Amount: \$59,400
- In-Kind Contribution: \$113,427

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100	Business Skills, Commercial Skills, Computer Skills	45	8-120	0	\$1,320	\$24.96
				Weighted Avg: 60			

- Reimbursement Rate: \$22 SB Non-Priority
- County: Orange
- Occupations to be Trained: Executive Assistant, Operations Staff, Partner, Staff Accountant, Tax Manager, Tax Senior
- Union Representation: ☐ Yes
☒ No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: Welsh Advisors in Anaheim will develop the proposal for a flat fee of \$6,935.
- Administrative Services: Welsh Advisors will also provide administrative services for an amount not to exceed 13% of earned funds.
- Training Vendors: To Be Determined

OVERVIEW

Founded in 1980 and located in Cypress, Murphy, Murphy & Murphy, Inc. (Murphy3) offers a wide range of services that span multiple industries. Services include tax preparation, tax planning, estate & retirement planning, business advisory, accounting & bookkeeping, and financial statement reviews & complications.

Need for Training

As a Certified Public Accounting firm, Murphy3 must respond to new and updated Federal and State tax regulations. There are currently over half a dozen published updates to accounting standards, with new updates added monthly. The Company must respond to these changes by re-evaluating reporting methods, apply new requirements for specific industries, and make other modifications to its services in order to ensure compliance. Employees also need to acquire skills in accounting & auditing, financial statement compilation, and financial analysis to drive efficiency.

Training Plan

All training will be conducted via class/lab. Most of the training will be provided by in-house trainers. Vendors will be used, if needed. In-house trainers will receive train-the-trainer skills before they can start instruction.

Business Skills - Training will be offered to all occupations. Topics in communication skills and teambuilding will be delivered to all occupations. Partners, Tax Seniors, and Tax Managers will receive training in Leadership and project management. Training will allow employees to work cohesively with each other.

Commercial Skills - Training will be offered to all occupations. Training in tax & accounting practices is needed to ensure that employees remain current with industry changes and improve their problem-solving skills.

Computer Skills - Training will be offered to all occupations. All occupations will receive training in Quickbooks software to ensure that they have the requisite skills in the company's accounting software. Executive Assistants, Staff Accountants, and Tax Seniors will receive training in MS Office to ensure they have the most up-to-date skills to perform their jobs.

Modifications

Maximum hours: Murphy3 requests an increase to the Small Business maximum hours limitation from 60 to 120 hours. The Company states that the accounting services industry requires employees to know general accounting processes and also stay up-to-date on the numerous Federal and State tax codes.

Murphy3 has a strategic training initiative to provide extensive training to employees weekly one-hour training sessions on tax updates/procedures. This training will take place for approximately 13 weeks during tax season. The Company also provides regular training sessions throughout the year to ensure that employees are up-to-date. As many as 50% of the workforce may receive up to 120 hours of training.

Two-year contract term:

Due to the number of hours required and the cyclical nature of accounting, the Company requests a two-year contract term.

Continuing Education

Eleven trainees (Partner, Tax Senior, Staff Accountant and Tax Manager) are required to complete 80 hours of continuing education within a 2-year period to retain their CPA licensure. These required courses are not included in this proposal.

RECOMMENDATION

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 120 Trainees will receive any of the following:

BUSINESS SKILLS

- Leadership Skills
- Teambuilding Skills
- Communication Skills
- Project Management

COMMERCIAL SKILLS

- Technical Updates/Procedures & Tax Techniques
- Accounting & Auditing Updates
- Financial Statement Compilation
- Financial Analysis
- Tax & Accounting Practices

COMPUTER SKILLS

- Quickbooks
- MS Office (Word, Outlook, Excel)

Note: Reimbursement for retraining is capped at 120 total hours per-trainee, regardless of method of delivery.
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DELEGATION ORDER



**Retrainee - Job Creation
Training Proposal for:
Norman, Fox & Co.**

Small Business

ET17-0491

Approval Date: May 24, 2017

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

CONTRACTOR

- Type of Industry: Services
 - Number of Full-Time Employees
 - California: 65
 - Worldwide: 65
 - Number to be trained: 32
 - Out-of-State Competition: Competitors Outside CA
 - Special Employment Training (SET): ☐ Yes ☒ No
 - High Unemployment Area (HUA): ☐ Yes ☒ No
 - Turnover Rate: 10%
 - Repeat Contractor: ☐ Yes ☒ No
- Priority Industry: ☐ Yes ☒ No
- Owner ☐ Yes ☒ No

FUNDING

- Requested Amount: \$24,992
- In-Kind Contribution: \$19,277

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	Continuous Improvement, Hazardous Materials, Hazwoper	28	8 - 60	0	\$770	\$16.96
				Weighted Avg: 35			
2	Retrainee Job Creation Initiative	Continuous Improvement, Hazardous Materials, Hazwoper	4	8 - 60	0	\$858	*\$14.13
				Weighted Avg: 39			

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

- Reimbursement Rate: Job #1: \$22 SB Non-Priority
Job #2: \$20 Job Creation/Retrainee
- County(ies): Los Angeles County
- Occupations to be Trained: Production Worker, Warehouse Worker, Driver, Manager/Supervisor
- Union Representation: ☐ Yes
☒ No
- Health Benefits: Job #1: \$1.96 per hour

SUBCONTRACTORS

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

OVERVIEW

Norman, Fox & Co. (NFC) (www.norfoxchem.com) has specialized in the development, manufacture and distribution of chemical products since its inception in 1971. The Company operates in two facilities in California: City of Industry and Vernon. NFC distributes their own line of Norfox-brand chemicals, as well as other brands produced through supplier collaborations. NFC products are used throughout the southwestern United States, in a broad range of industries such as agriculture, personal care, paints and coatings, food and pharmaceutical.

NFC products vary from blend formulations to complex organic chemistry syntheses. The Company can also create new products to meet customers' specific needs. The distribution line includes bulk liquid-to-package transfer, and factory-packed materials in a choice of containers (pails, drums and totes). The Company is able to produce both large and small orders using reactors, dry and liquid blend tanks and bulk storage tanks. The Company also provides testing and certification, quality control and ongoing technical support.

NFC continuously invests in research which creates a need for training to develop and enhance employee skills and improve processes. In addition, NFC has experienced growth in sales of at least 10% per annum, in recent years. NFC must respond to this growth by hiring more production and warehouse workers. Other training needs are based on industry requirements and the type of raw materials used in NFC products. (e.g. Hazardous Materials certification).

Retrainee/Job Creation

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

NFC has committed to hiring 4 new employees (Job Number 2). The date-of-hire for all trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

NFC will recruit, hire, and train these employees within the next two years to fill in positions that will be created in anticipation of the Company's growing market and increase in product demand. The training in this proposal will help newly-hired personnel confidently transition into performing effectively and efficiently.

Commitment to Training

NFC has an annual training budget of \$12,000 for mandatory training, employee orientation, basic safety training, 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

NFC is ready to start training upon project approval. Training will be provided at the Company's facilities in City of Industry and Vernon by a combination of in-house staff and training vendors that are currently under consideration. The Company is planning to provide an average of two hours of training per month to their 32 employees within the next 21 months. NFC has assigned one staff person from Operations and another from Finance who will be dedicated to scheduling and tracking the training and function as the point of contact with ETP.

Training Plan

This is NFC's first ETP Agreement. ETP-funded training will enable the Company to establish a new training culture and implement a program that will benefit all employees. Training will help NFC provide structured and formal training to improve employee performance specific to their job requirements.

Continuous Improvement (25%): This training will be offered to all occupations and will assist staff with developing decision-making skills and enhance understanding of Company processes and procedures.

Hazardous Materials (60%): This training will be offered to all occupations. Employees will be trained in the proper handling and transport of hazardous materials and related equipment to maintain a safe and efficient work environment.

HAZWOPER (15%): This training will be offered to Warehouse Workers, Drivers and Manager/Supervisors. Training is specifically designed for workers engaged in the removal of hazardous substances, or other activities which expose them to such substances.

Certified Safety Training

1. Hazardous Waste Operations and Emergency Response Standard (HAZWOPER). This training is a series of courses specifically designed for workers who handle hazardous substances as first-responders, or clean-up as needed at a hazard disposal or emergency site. It consists of 40 hours of classroom or CBT training, for workers stationed at the hazard site; and 24 hours for workers who visit the site (e.g., engineers). Field training is also required, although not funded by ETP. Completion of the training results in a certificate that expands employment opportunities. Each certification requires an 8-hour annual refresher course. This coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.
2. Hazardous Materials (HAZMAT). This training is also a series of courses, specific to industry sectors involved in the transport of hazardous materials. The coursework varies in length depending on the industry and the occupational title, as organized in five levels ranging from "first responder" to "incident commander." It is generally a minimum of 24 hours with an 8-hour annual refresher, and may be delivered by classroom or CBT. In this proposal, Production Worker, Warehouse Worker, Driver and Manager/Supervisor will receive up to 24 hours of training. Field training may be required, although not funded by ETP.

RECOMMENDATION

Staff recommends approval of this proposal.

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

8 – 60

Trainees may receive any of the following:

CONTINUOUS IMPROVEMENT

- Corrective/Preventive Action Plan
- Incident Investigation
- Internal Auditing
- Audit Review and Corrective Action
- Responsible Distribution
- Root Cause Analysis

HAZARDOUS MATERIALS

- Aqua Ammonia Handling
- Bulk Tankers
- Extremely Hazardous Materials
- Cargo Tank Driver Rollover Prevention
- Transportation of Hazardous Materials
- Combustible Dust
- Confined Space Entry
- Confined Space Entry Team (Attendant, Entrant, Supervisor)
- Contractor Compliance Review
- Controlled Substance Handling
- Derail Use – Railcars
- Shipping/Receiving Hazardous Materials
- Hazardous Materials Placarding and Labeling
- Hazardous Materials Tote Markings, Test Dates
- Drum Pickers
- Electric Pallet Jack
- Emergency Evacuation Map and Procedures
- Emergency Response Guidebook
- Emergency Response Plan
- Handling Hazardous Material Drum with Residue
- Ethylenediamine Handling
- Evacuation Alarm
- Eye Protection
- Fall Protection
- Shipping Hazardous Materials via FedEx or UPS Ground
- Flexitank Unloading
- Hazardous Materials Railcar Paperwork
- Fluorosilicic Acid Unloading Precautions
- Foot Protection
- Forklift
- Grinder Operation
- Grounding and Bonding
- Grounding Meter, Clamps
- Skin Protection
- Hazard Communication
- Hazardous Waste

- Driving with Hazardous Materials
- Hearing Protection
- Heat Illness Protection
- Drum/Tote Warmer Operation
- Hot Work
- Hydrofluoric Acid Handling
- Air Shipments of Hazardous Materials
- Ocean Shipments of Hazardous Materials
- Loading Dock & Warehouse Operations
- Lock Out / Tag Out
- Management of Change
- Manlift
- Non-conformity Control and Labeling
- Oily/Flammable Rag Waste
- Operations Procedures, Topics
- Personal Protective Equipment & Safety
- pH Probe, Acids and Bases
- Portable Doct Plate/Board
- Personal Protective Equipment Rules
- Process Hazard Analysis
- Process Safety Management
- Product Segregation
- Production Equipment Cleaning
- Propane Tanks for Forklifts
- Pump Screens
- Rail Tank Car Preshipment Checklist
- Rail Tank Car Unloading Form
- Railcar Operation
- Railcar Securement
- Railcar Unloading
- Equipment Repair Process
- Respirator Fit Test
- Respirator Training
- Emergency Shower/Eyewash
- Sampling Procedure
- Self-contained Breathing Apparatus (SCBA)
- Hazardous Materials Security
- Hazardous Materials Shipping Papers
- Spill Prevention, Control and Countermeasure Plan
- Spill Control Log
- Spill Kit
- Spill Response
- Storm Water
- Flexible Intermediate Bulk Container Handling
- Tank Car Securement & General Unloading Procedures
- Tanker Driving & Inspections
- Tanker Loading/Unloading
- Torquing Containers
- Universal Waste Management
- Gas Detector

HAZWOPER

- HAZWOPER Awareness

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



**TRAINING PROPOSAL FOR
Partners in Control, Inc.
17-0543**

Panel Meeting Date: 05/25/2017
Regional Office: San Diego Regional Office
Analyst Name: Clady, Cassandra
Type of Proposal: Single Employer Contract (SE)
Funding Source: OSC

FUNDING OVERVIEW:

TOTAL ETP FUNDING: \$56,056.00				
Training Cost	Admin Cost	Support Cost	Substantial Contribution	Total In-Kind
\$48,745.00	\$7,311.00	N/A	\$0.00	\$49,000.00

PROJECT PROFILE:

Repeat Contractor:	Yes			
Estimated Number of Trainees:	22	High Unemployment Area:	No	
No. of Employees: (Applicant)	State:23 US:23 WorldWide:23	Turnover Rate: (Applicant)	0.00%	

Industry Sector(s)	Priority Industry
Professional, Scientific, and Technical	Yes

FUNDING DETAILS:

Funding	Group No.	Attributes	Estimated No. of Trainees	Weighted Average Hours	Reimbursed Rate	Average Cost Per Trainee
OSC	1	S-RET-OWNER	22	98	\$26.00	\$2,548.00

		Total:	22			
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TRAINING PLAN OVERVIEW:

Job Title	County of Workplace Location	Number of Trainees	Training Hours (Min-Max)	Wage Waiver	ETP Min Wage	Base Wage Range	Health Benefits Used	Contract Standard Min Wage
Group #: 1	Attributes: S-RET-OWNER					Reimbursement Rate: \$26.00		
Business Development	Orange County	2	8-140		\$17.22	\$51.00 - \$57.00	0.00	\$51.00
Engineer,	Orange County	3	8-140		\$17.22	\$33.00 - \$48.00	0.00	\$33.00
Junior Engineer	Orange County	8	8-140		\$17.22	\$33.00 - \$48.00	0.00	\$33.00
Lead Engineer	Orange County	3	8-140		\$17.22	\$48.00 - \$51.00	0.00	\$48.00
Manager	Orange County	2	8-140		\$17.22	\$51.00 - \$57.00	0.00	\$51.00
Owner	Orange County	2	8-140		\$17.22	\$51.00 - \$57.00	0.00	\$51.00
Project Manager	Orange County	2	8-140		\$17.22	\$48.00 - \$51.00	0.00	\$48.00

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

INTRODUCTION

Partners in Control, Inc., (Partners in Control), <http://www.eaintegrator.com> seeks ETP funding for retraining. Founded in 2007, the Company, is headquartered in Irvine, CA, which is its only location.

Partners in Control meets the Panel's Out-of-State Competition (OSC) requirements.

Training will be conducted at the following location(s): Irvine

PRODUCT/SERVICES

Partners in Control designs and implements controls for various industrial engineering control systems. This includes: water treatment plants, solar power, pharmaceutical manufacturing and conveyor controls.

This will be the second agreement between ETP and Partners in Control, and the second within the last five years. In the first project, training focused on technical skills. In this proposal, training will focus on Business, Computer, and Commercial Skills necessary to enhance staff knowledge of new processes, and introduce engineering software such as Citect and Wonderware.

Customer Base

The Company's customer base includes Municipal Water Management and waste water treatment organizations.

PROJECT DETAILS

PURPOSE OF TRAINING

Partners in Control is required to keep up with the continuing changes in its industry in order to stay competitive. Therefore, the company plans to provide ongoing training.

Partners in Control seeks funding to enhance staff knowledge as discussed above. The Company's goal for the proposed contract is to improve the skills of 22 employees to successfully implement such systems.

TRAINING DETAILS

Location	Substantial Contribution	Level Of Reduction
Partners in Control, Inc.	\$0.00	0.00%

TRAINING PLAN

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

Business Skills - Training will be provided to all occupations. Trainees will learn Communication and teambuilding, Project Management Skills Leadership Skills and Business Management to improve interactions with customers and collaborate with others, and be able to manage multiple engineering projects with critical timelines.

Computer Skills - Training will be provided to Engineers who need critical, software application skills in programming, networking and systems. The computer courses will be updated/revised computing platforms, Networking (new versions) and Microsoft, Word, Excel and Outlook.

Commercial Skills - Training will be provided to Engineers and Project Managers to ensure all trainees have the requisite skills for engineering specifications, testing, technologies, documentation and all phases of system integration services.

Training Curriculum		
Delivery Method - Type	Training Type	Training Level
Classroom/Simulated Laboratory	Business Skills	
Classroom/Simulated Laboratory	Commercial Skills	Standard
Classroom/Simulated Laboratory	Computer Skills	Standard

Turnover Rate

ETP funds training for stable, secure jobs. Employer's turnover rate cannot exceed 20% for the facility where training is requested, as measured in the 12 months during proposal development.

Turnover Rate		
Location	City	Turnover Rate Percent
Partners in Control, Inc.	Irvine	0.00%

SUBCONTRACTOR

None

PERFORMANCE

Active Contract

None

Prior Performance

The table summarizes the Company's performance under prior contract(s) within the last five years:

Agreement Number: ET15-0333

Location: Irvine

Term: 12/31/14 -12/30/16

Approved Amount: \$52,000

Projected Earnings: \$52,000 =100%.

JUSTIFICATION FOR TRAINING HOURS

Small business employers are capped at 60 hours per trainee.

Partners in Control requests to increase the average hours to 140 hours, with an average of approximately 100 hours per trainee.

In the prior project, the Company provided an average of 103 hours per trainee and has provided staff with a detailed roll out schedule to support the number of proposed training hours in this project.

RECOMMENDATION

For the reasons set forth above, staff recommends approval of this proposal.



Panel Amendment #1 Proposal for:
Q C M, Inc. dba Veris Manufacturing
Agreement Number: ET17-0110

Amendment Effective Date: March 28, 2017

Panel Meeting of: May 25, 2017

ETP Regional Office: San Diego

Analyst: H. Bernard

CURRENT PROJECT PROFILE

Contract
Type: Priority/SB<100

Industry
Sector(s): Manufacturing

Counties
Served: Orange

Repeat
Contractor: ☒ Yes ☐ No

Union(s): ☐ Yes ☒ No

Priority
Industry: ☒ Yes ☐ No

Current Contract Term: July 1, 2016 to
June 30, 2018

Substantial
Contribution: ☐ Yes
☒ No

CURRENT FUNDING

Current Funding
\$37,700

AMENDMENT FUNDING

Requested Funding	Total Funding
\$37,700	\$75,400

AMENDMENT TRAINING PLAN TABLE

Job No.	Job Description (By Contract Type)	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee	Business Skills, HazMat, Computer Skills, Continuous Impr, Mfg Skills	44	8-200	0	\$1,508	*\$16.51
				Weighted Avg: 58			
2	Job Creation	Business Skills, HazMat, Computer Skills, Continuous Impr, Mfg Skills	6	8-200	0	\$1,508	*\$13.76
				Weighted Avg: 58			

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

Minimum Wage by County: \$16.51 in Job Number 1 and \$13.76 in Job Number 2 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

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

Wage Range by Occupation	
Occupation Title	Wage Range
Job Number 1	
Production Staff	\$14.49 – 36.06
Administrative Staff	\$15.50 - \$44.07
Supervisor/Manager	\$31.62 - \$61.53
Job Number 2	
Production Staff	\$11.00 - \$36.06
Administrative Staff	\$11.00 - \$38.07

INTRODUCTION

Founded in 1987 and located in Brea, Q C M, Inc. dba Veris Manufacturing (Veris) manufactures electronic products such as printed circuit boards, cable and box-build components. The Company also offers conformal coating and testing services. Veris' products are used in medical, test and measurement, aerospace and military, capital equipment, telecom and industrial markets.

AMENDMENT DETAILS

Veris is requesting to increase the Agreement Amount from \$37,700 to \$75,400 resulting from an increase in the weighted average hours from 29 to 58. At the beginning of the project, the Company set a goal to be accredited through the National Aerospace and Defense Contractors Accreditation Program (NADCAP). Veris received accreditation in April 2017. This accreditation is required to serve Tier 1 Military/Aerospace customers. The accreditation

required extensive training for all staff. The Company has tracked training hours equivalent to 99% of the Agreement amount with over 12 months left to train. As NADCAP training is almost complete, the Company will now focus on other training topics critical to operations on the Curriculum.

Topics include:

1. IPC-610: This is a standard used by the electronics manufacturing industry for production requirements of equipment and assemblies. Training requires up to 40 hours of training and re-certification every two years.
2. New Customers: Recently the Company began working with 3 new core customers potentially generating over \$1 Million in business. To adequately serve these customers, the Company must provide training to understand new products, processes and testing procedures.
3. Flying Probe Machine: Training on this equipment was included in the initial ETP Proposal. However, NADCAP Certification training was a priority. Now, the Company will focus on the machinery training.
4. Additional Continuous Improvement, Process, and Leadership Skills Training: These topics also took a backseat to NADCAP Certification training.

The Company schedules monthly training and can easily accommodate sensitive training based on customer needs and product launch dates. Currently, the Company has two staff committed full-time to training staff as well as a training team consisting of one trainer per department. All training will be provided in topics from the current Curriculum.

Veris also requests to increase the maximum training hours from 150 to 200 hours for both Job Numbers. The Company currently has 4 trainees with over 100 hours and expects these trainees to receive more than 150 total hours of training.

RECOMMENDATION

Staff recommends approval of this Amendment.

SUMMARY OF PRIOR MODS/AMDS

N/A

CURRENT CONTRACT PERFORMANCE

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

Agreement No.	Approved Amount	Term	No. Trainees Enrolled	No. Completed Training	No. Retained
ET17-0110	\$37,700	07/01/2016– 06/30/2018	53	00	0

Based on ETP Systems, 49 trainees have received training and 1,438 reimbursable hours have been tracked for potential earnings of \$37,388 (99% of approved amount).

Exhibit B: Menu Curriculum**Class/Lab Hours****8 - 200**

Trainees may receive any of the following:

BUSINESS SKILLS

- ✦ Coaching
- ✦ Communication
- ✦ Conflict Resolution
- ✦ Customer Relations
- ✦ Finance
- ✦ Goal Setting
- ✦ International Traffic and Arms Regulation
- ✦ Inventory Control
- ✦ Leadership
- ✦ Marketing & Business Development
- ✦ Program Management
- ✦ Product Knowledge
- ✦ Project Management
- ✦ Team Building




















COMPUTER SKILLS

- ✦ Accounting
- ✦ Aegis Factory Logix MES
- ✦ Asana
- ✦ CircuitCam
- ✦ Crystal Reports
- ✦ ERP Software (Vantage by Epicor)
- ✦ Manufacturing
- ✦ MRP
- ✦ MS Office
- ✦ MS Project
- ✦ Purchasing
- ✦ Quote FX
- ✦ Scheduling
- ✦ Warehouse


CONTINUOUS IMPROVEMENT

- ✦ 6S
- ✦ AS9100
- ✦ Corrective/Preventive Actions
- ✦ ISO9001-2008
- ✦ ISO 13485
- ✦ Lean Manufacturing
- ✦ National Aerospace & Defense Contractors Accreditation Program
- ✦ Compliance Processes Process Improvement
- ✦ Productivity Improvement
- ✦ Quality improvement

MANUFACTURING SKILLS

-  AOI Inspection and Programming
-  Blueprint Reading
-  DEK Stencil Printer
-  Equipment Operation, Maintenance & Troubleshooting
-  Hand Soldering to J-Std
-  Inspection Techniques
-  IPC-610
-  Juki SMT Pick and Place Machine
-  Lean Manufacturing
-  Moisture Sensitive Devices
-  Material Requirements Planning
-  Preventative Maintenance
-  Programmable Conformal Coating Machine
-  Solder Paste Handling
-  Surface Mount Defects—Causes and Prevention
-  SMT and Stencil Operation
-  Statistical Process Control
-  VI Technology SPI Machine
-  X-ray Machine Inspection

HAZARDOUS MATERIALS

-  HazMat Handling

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

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.
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**TRAINING PROPOSAL FOR
SOUTHWEST BOULDER & STONE, INC.
17-0578**

Panel Meeting Date: 05/25/2017
Regional Office: San Diego Regional Office
Analyst Name: Ray, Maria
Type of Proposal: Single Employer Contract (SE)
Funding Source: OSC

FUNDING OVERVIEW:

TOTAL ETP FUNDING: \$93,600.00				
Training Cost	Admin Cost	Support Cost	Substantial Contribution	Total In-Kind
\$81,392.00	\$12,208.00	N/A	\$0.00	\$74,412.00

PROJECT PROFILE:

Repeat Contractor:	No			
Estimated Number of Trainees:	90	High Unemployment Area:	Yes	
No. of Employees: (Applicant)	State:90 US:90 WorldWide:90	Turnover Rate: (Applicant)	0.83%	

Industry Sector(s)	Priority Industry
Manufacturing	Yes

FUNDING DETAILS:

Funding	Group No.	Attributes	Estimated No. of Trainees	Weighted Average Hours	Reimbursed Rate	Average Cost Per Trainee
OSC	1	S-RET-OWNER	90	40	\$26.00	\$1,040.00
		Total:	90			

TRAINING PLAN OVERVIEW:

Job Title	County of Workplace Location	Number of Trainees	Training Hours (Min-Max)	Wage Waiver	ETP Min Wage	Base Wage Range	Health Benefits Used	Contract Standard Min Wage
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Group #: 1		Attributes: S-RET-OWNER				Reimbursement Rate: \$26.00		
Admin	San Diego County	9	8-60		\$16.72	\$13.89 - \$42.00	\$2.83	\$16.72
Customer Service	Riverside County	2	8-60		\$16.16	\$13.13 - \$41.88	\$2.83	\$16.16
Customer Service	Riverside County	3	8-60		\$16.16	\$13.33 - \$29.00	\$2.83	\$16.16
Customer Service	San Diego County	1	8-60		\$16.72	\$14.00 - \$14.00	\$2.83	\$16.83
Customer Service	San Diego County	1	8-60		\$16.72	\$16.00 - \$16.00	\$2.83	\$18.83
Customer Service	San Diego County	3	8-60		\$16.72	\$13.89 - \$32.00	\$2.83	\$16.72
Customer Service	San Diego County	8	8-60		\$16.72	\$13.89 - \$29.50	\$2.83	\$16.72
owner	San Diego County	2	8-200		\$16.72	\$50.00 - \$50.00	0.00	\$50.00
Production	Riverside County	3	8-60		\$16.16	\$13.33 - \$31.00	\$2.83	\$16.16
Production	Riverside County	4	8-60		\$16.16	\$13.13 - \$31.34	\$2.83	\$16.16
Production	San Diego County	2	8-60		\$16.72	\$13.89 - \$21.99	\$2.83	\$16.72
Production	San Diego County	4	8-60		\$16.72	\$13.89 - \$28.00	\$2.83	\$16.72
Production	San Diego County	4	8-60		\$16.72	\$13.89 - \$31.00	\$2.83	\$16.72
Production	San Diego County	25	8-60		\$16.72	\$13.89 - \$30.00	\$2.83	\$16.72
Sales	San Diego County	6	8-60		\$16.72	\$13.89 - \$41.50	\$2.83	\$16.72
Supervisor/Manager	Riverside County	1	8-60		\$16.16	\$20.00 - \$20.00	0.00	\$20.00
Supervisor/Manager	Riverside County	1	8-60		\$16.16	\$36.00 - \$36.00	0.00	\$36.00
Supervisor/Manager	San Diego County	1	8-60		\$16.72	\$33.00 - \$33.00	0.00	\$33.00
Supervisor/Manager	San Diego County	1	8-60		\$16.72	\$35.00 - \$35.00	0.00	\$35.00
Supervisor/Manager	San Diego County	1	8-60		\$16.72	\$36.00 - \$36.00	0.00	\$36.00
Supervisor/Manager	San Diego County	8	8-60		\$16.72	\$17.00 - \$45.00	0.00	\$17.00

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

INTRODUCTION

SOUTHWEST BOULDER & STONE, INC., (SWB) (<http://www.southwestboulder.com>) seeks ETP funding for retraining.

SWB is a family-owned, small business, specializing in the manufacture, supply and installation of landscape products. Established in 1989 and headquartered in Fallbrook, the Company has grown steadily over the years, starting from a two-employee company to 90 employees throughout six facilities in Southern California: four in San Diego County and two in Riverside County. This will be SWB's first ETP Agreement.

SWB meets the Panel's Out-of-State Competition (OSC) requirements.

Training will be conducted at the following cities: Cathedral City, Indio and San Diego (four locations).

Products / Services

The Company's main products include landscape boulders; specimen water-feature boulders; cobbles and pebbles; flagstone and building stones; natural thin veneers; crushed decorative rocks; eclectic fountains; decorative fire-pits and fire-glass construction rocks; sands, fines, and decomposed granites; soil binders, composts, and mulches; masonry supplies; manufactured stones; blocks and bricks; segmental retaining wall systems; and interlocking pavers.

Customer Base

The Company's customer base includes retail and public entities; commercial and residential building, masonry, and landscape contractors; pool builders; and residential homeowners.

PROJECT DETAILS

Purpose of Training

Training will be delivered via class/lab, Computer-Based Training and Productive Lab by in-house subject matter experts and vendors as needed.

Due to the recent drought conditions in Southern California, SWB experienced a significant opportunity to educate its customers the myriad possibilities of utilizing stone in landscaping. To support increased customer demands for drought resistant landscape products, the Company must train staff in current trends in construction materials, equipment and installation processes. To this end, the Company plans to add new product lines including Fiberglass and Natural Thin Veneers (NTV). NTVs are standard stones cut into a thin veneer to allow for easy installation. Corner pieces are cut to create the look of a full-size stone for less cost.

Further, SWB invested \$864,000 on new a new Enterprise Resource Planning System and various new design software systems including Adobe Illustrator, Adobe Premier Pro, Microsoft Office 365, and Microsoft Teams. In addition, the Company plans to create a Building Design Center where employees are able to show customers how to build projects using Computer-Aided Design and various new software systems.

TRAINING DETAILS

ETP funding will allow the Company to provide its workforce comprehensive training to support its business goals mentioned above, specifically, in the entire phase of product installation. Funding will allow SWB to provide staff with training targeted to specific roles and responsibilities of each job occupation to improve existing and develop new business processes.

SWB is currently delivering training and is ready to begin ETP training upon approved. The Company designated two Regional Managers to schedule, coordinate and oversee training for all six locations. In addition, each location's Safety Officer and Store Supervisor will manage recordkeeping including collecting and submitting attendance rosters to the administrative subcontractor.

High Unemployment Area

Some trainees work in a High Unemployment Area (HUA), with unemployment exceeding the state average by 25%. The Company's location in Riverside County (Indio) qualifies for HUA status under these standards. The Panel may modify the ETP Minimum Wage for these trainees; however, SWB does not request HUA wage modification in this proposal.

Location	Substantial Contribution	Level Of Reduction
SOUTHWEST BOULDER & STONE, INC.	\$0.00	0.00%
Cathedral City	\$0.00	0.00%
Chula Vista	\$0.00	0.00%
Escondido	\$0.00	0.00%
Indio	\$0.00	0.00%
Pacific Beach	\$0.00	0.00%

TRAINING PLAN

The following types of training will be provided:

Training Curriculum		
Delivery Method - Type	Training Type	Training Level
Classroom/Simulated Laboratory	Business Skills	Standard
Classroom/Simulated Laboratory	Computer Skills	
Classroom/Simulated Laboratory	Continuous Improvement Skills	
Classroom/Simulated Laboratory	Hazardous Materials Skills	

Classroom/Simulated Laboratory	Manufacturing Skills (ME)	Standard
E-Learning - Computer Based Training (CBT)	Business Skills	
E-Learning - Computer Based Training (CBT)	Computer Skills	
E-Learning - Computer Based Training (CBT)	Manufacturing Skills (ME)	Standard
Productive Laboratory	Manufacturing Skills (ME)	Standard

Turnover Rate

ETP funds training for stable, secure jobs. Employer's turnover rate cannot exceed 20% for the facility where training is requested, as measured in the 12 months during proposal development.

Turnover Rate		
Location	City	Turnover Rate Percent
SOUTHWEST BOULDER & STONE, INC.	Fallbrook	5.00%
Indio	Indio	0.00%
Cathedral City	Cathedral City	0.00%
Escondido	Escondido	0.00%
Pacific Beach	San Diego	0.00%
Chula Vista	Chula Vista	0.00%

Productive Laboratory

Productive Laboratory (PL) trainees may produce goods for profit as part of the training, in the courses identified under the Curriculum. For PL the trainer-to-trainee ratio cannot exceed 1:1. The ratio may be lower, and maximum hours per-trainee may be capped, as shown in the Curriculum.

SWB requests up to 24 hours of PL training for select Production Staff. Trainees will be trained on various construction equipment and loading methods.

The PL trainer will be fully trained and subject-matter experts who will instruct and deliver the course content and material. Trainers will be both in-house or outside training vendors with extensive experience in the processes and equipment being used for training.

CBT

CBT hours are capped at 50% of total training hours per-trainee.

SUBCONTRACTOR

Admin		
Subcontractor Name	City	Service Cost
TRAINING FUNDING SOURCE	Seal Beach	\$0.00

SWB retained the below Development SubContractor(s) to perform Development services for a fee shown in the table and fee not to exceed \$4,000.

Development		
Subcontractor Name	City	Service Cost
TRAINING FUNDING SOURCE	Seal Beach	\$4,000.00

PERFORMANCE

Active Contract

None

Prior Performance

None

RECOMMENDATION

For the reasons set forth above, staff recommends approval of this proposal.



**TRAINING PROPOSAL FOR
The Brownie Baker, Inc. 17-
0711**

Panel Meeting Date: 05/17/2017
Regional Office: Sacramento Regional Office
Analyst Name: Lazarewicz, Jana
Type of Proposal: Single Employer Contract (SE)
Funding Source: OSC

FUNDING OVERVIEW:

TOTAL ETP FUNDING: \$83,980.00				
Training Cost	Admin Cost	Support Cost	Substantial Contribution	Total In-Kind
\$70,856.00	\$13,124.00	N/A	\$0.00	\$101,000.00

PROJECT PROFILE:

Repeat Contractor:	Yes			
Estimated Number of Trainees:	82	High Unemployment Area:	Yes	
No. of Employees: (Applicant)	State:94 US:94 WorldWide:94	Turnover Rate: (Applicant)	17.00%	
Industry Sector(s)				Priority Industry
Manufacturing				Yes

FUNDING DETAILS:

Funding	Group No.	Attributes	Estimated No. of Trainees	Weighted Average Hours	Reimbursed Rate	Average Cost Per Trainee
OSC	1	S-RET	58	35	\$26.00	\$910.00
	2	S-RET-JOBCREATION	24	50	\$26.00	\$1,300.00
		Total:	82			

TRAINING PLAN OVERVIEW:

Job Title	County of Workplace Location	Number of Trainees	Training Hours (Min-Max)	Wage Waiver	ETP Min Wage	Base Wage Range	Health Benefits Used	Contract Standard Min Wage
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Group #: 1	Attributes: S-RET					Reimbursement Rate: \$26.00		
Administration	Fresno County	8	8-60	HUA Wage	\$12.12	\$11.50 - \$30.00	0.00	\$16.16
Front Line Managers	Fresno County	4	8-60	HUA Wage	\$12.12	\$14.00 - \$22.00	0.00	\$16.16
Production	Fresno County	36	8-60	HUA Wage	\$12.12	\$11.50 - \$18.00	0.00	\$16.16
Quality Control	Fresno County	1	8-60	HUA Wage	\$12.12	\$12.00 - \$12.00	\$2.00	\$16.16
Shipping	Fresno County	4	8-60	HUA Wage	\$12.12	\$11.50 - \$13.50	0.00	\$16.16
Supervisors	Fresno County	5	8-60	HUA Wage	\$12.12	\$13.00 - \$17.00	0.00	\$16.16
Group #: 2	Attributes: S-RET-JOBCREATION					Reimbursement Rate: \$26.00		
Production	Fresno County	20	8-60	HUA Wage	\$10.50	\$12.12 - \$18.00	0.00	\$13.22
Shipping	Fresno County	2	8-60		\$13.22	\$11.50 - \$12.50	0.00	\$13.22
Supervisors	Fresno County	2	8-60		\$13.22	\$13.50 - \$14.50	0.00	\$13.50

Legend of Attributes	
Code	Description
S	Single Employer Contract
RET	Retrainee
JOBCREATION	Job Creation ±Retrainee Initiative Program

INTRODUCTION

The Brownie Baker, Inc., (Brownie Baker), (<http://www.browniebaker.com>) seeks ETP funding for retraining. The Company, founded in 1979 and headquartered in Fresno, CA, will have two locations in Fresno participating in this Agreement.

Brownie Baker has grown from a home based business selling gift baskets to a company with products countrywide. Products can be found in grocery stores and convenience stores throughout the country, including brownies, cakes, cookies, danish, doughnuts, muffins, and Pan Dulce. The Company also makes low fat and medical meal cookies.

Brownie Baker meets the Panel's Out-of-State Competition (OSC) requirements.

Training will be conducted at the following location(s): Fresno

PROJECT DETAILS

Purpose of Training

Brownie Baker seeks funding in order to provide training as follows:

This is Brownie Baker's fourth ETP Agreement and the third in the past five years. The prior contract focused on training Production Staff in newly purchased packing equipment. Brownie Baker's new training goals are to continue building on its previous training and provide training on additional new equipment and production processes.

Brownie Baker is opening a new Fresno facility in July 2017 to accommodate a new customer base. Brownie Baker will produce a new private label production for store brand (i.e. Walmart's Great Value brand) products. In addition, the Company has invested \$3M on new machinery such as a tunnel oven; shrink wrap packing machine; tunnel dishwasher; and danish production line mixer, oven and conveyors. Installation of all new equipment at the new facility is scheduled to be completed in July. Brownie Baker's other facility will receive new danish production equipment. Installation of new equipment will require workers to learn new technological and process skills to be efficient and productive. Training will provide workers skills necessary to promote and support customer demands and business growth.

TRAINING DETAILS

High Unemployment Area

This is a region(s) with unemployment exceeding the state average by 15%.

The wage may be modified to the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. The trainees in a HUA may receive more hours of basic or literacy skills training (Vocational English as a Second Language), as shown in the Curriculum. The company requires a wage modification from \$16.16 per hour to \$12.12 per hour to meet the required ETP minimum wage for the following occupations:

Occupation	Waiver Wage	No. of Trainees
Business and Financial Operations Occupations	\$12.12	8
Management Occupations	\$12.12	4
Production Occupations	\$10.50	20
Production Occupations	\$12.12	1
Production Occupations	\$12.12	4
Production Occupations	\$12.12	5
Production Occupations	\$12.12	36

Retrainee - Job Creation

Brownie Baker has committed to hiring 24 new employees. Trainees must be hired within the three-month period prior to Panel approval or during the term of contract.

Brownie Baker is expanding their workforce for the following reasons:

Expanded product line, New Customer base, New equipment, New facility, New product line. The 24 new employees will be hired for the new facility.

Location	Substantial Contribution	Level Of Reduction
Production #2	\$0.00	0.00%
Primary office and production	\$0.00	0.00%

TRAINING PLAN

The following types of training will be provided:

Training Curriculum		
Delivery Method - Type	Training Type	Training Level
Classroom/Simulated Laboratory	Business Skills	
Classroom/Simulated Laboratory	Computer Skills	Standard
Classroom/Simulated Laboratory	Continuous Improvement Skills	
Classroom/Simulated Laboratory	Manufacturing Skills (ME)	Standard
Productive Laboratory	Manufacturing Skills (ME)	Standard

Turnover Rate

ETP funds training for stable, secure jobs. Employer's turnover rate cannot exceed 20% for the facility where training is requested, as measured in the 12 months during proposal development.

Turnover Rate		
Location	City	Turnover Rate Percent
Production #2	Fresno	17.00%
Primary office and production	Fresno	17.00%

Productive Laboratory (PL)

Due to the nature of the business, certain trainings cannot be replicated in a class/lab environment. PL training will allow practical, real-world experience in the production environment.

Brownie Baker is requesting PL training for 79 Production workers. Equipment to be used during PL includes a tunnel oven, shrink wrap packing machinery; and Danish line mixers, oven, and conveyors.

Brownie Baker has requested a 1:3 training ratio for efficient training as the production line requires groups of threes to operate. Production will need to operate on a start/stop basis during PL for instructional purposes and corrective action. PL will be capped at 17 hours per trainee.

Training will be at a much slower pace than regular production with significantly higher defects as trainees gain proficiency. A subject-matter expert will conduct training. The trainer will first demonstrate how to use the equipment, then supervise trainees using the equipment. The trainer will attest to trainee competency once training is completed.

SUBCONTRACTOR

Brownie Baker retained Strategic Business Solutions, LLC in Visalia to assist with administration for a fee not to exceed 13% of payment earned.

Brownie Baker retained the below Development SubContractor(s) to perform Development services for a fee shown in the table and fee not to exceed \$5,750.

Development		
Subcontractor Name	City	Service Cost
Strategic Business Solutions, LLC	Visalia	\$5,750.00

PERFORMANCE

Active Contract

N/A

Prior Performance

Below summarizes Contractor's performance under prior contract(s) completed within the last five years:

Agreement Number: ET15-0167 **Location:** Fresno

Term: 7/1/2014 - 6/30/2016

Approved Amount: \$76,440 **Payment Earned:** \$52,598 (69%)

*Brownie Baker had one person dedicated to administering the program. This proved problematic when that person suddenly left the Company. While restructuring, the Company experienced a five month gap where no training occurred.

For this new Agreement, The Brownie Baker has designated three Human Resources staff members to oversee project administration and ensure no disruption in training. These staff members are responsible for scheduling and arranging all training at both Fresno facilities.

Agreement Number: ET13-0293 **Location:** Fresno

Term: 2/4/2013 - 2/3/2014

Approved Amount: \$30,628 **Payment Earned:** \$11,889 (39%)

*According to the Company, the poorer-than-expected performance was attributed to a sudden surge in business which did not allow time for training.

RECOMMENDATION

For the reasons set forth above, staff recommends approval.

DELEGATION ORDER



Training Proposal for:
The Wonderful Company LLC
Agreement Number: ET17-0492

Approval Date: May 15, 2017

ETP Regional Office: North Hollywood

Analyst: L. Vuong

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Manufacturing Services Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles, San Luis Obispo	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 4,530	U.S.: 6,320	Worldwide: 7,800
<u>Turnover Rate:</u>	7%		
<u>Managers/Supervisors:</u> (% of total trainees)	13%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$99,960		\$0	\$0		\$99,960

In-Kind Contribution:	100% of Total ETP Funding Required	\$110,000
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee	Business Skills, Computer Skills, Cont. Impr., Mfg. Skills	190	8-200	0	\$510	*\$16.96
				Weighted Avg: 34			
2	Retrainee Priority Rate	Business Skills, Computer Skills, Cont. Impr., Mfg. Skills	5	8-200	0	\$612	*\$16.16
				Weighted Avg: 34			

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

Minimum Wage by County: Job Number 1: \$16.96 per hour for Los Angeles County;
Job Number 2: \$16.16 per hour for San Luis Obispo 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 \$2.98 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	\$14.24 - \$28.42	25
Directors/Managers/Supervisors	\$20.73 - \$48.34	25
Finance Staff	\$24.69 - \$39.13	25
Information Technology Staff	\$30.09 - \$50.26	25
Production Worker	\$13.98 - \$21.66	10
Marketing Staff	\$19.23 - \$48.57	40
Technical Support Staff	\$18.95 - \$34.45	40
Job Number 2		
Administrative Staff	\$14.01 - \$14.70	1
Finance Staff	\$23.44 - \$23.76	1
Production Worker	\$13.18 - \$15.22	3

INTRODUCTION

The Wonderful Company LLC (TWC) (www.wonderful.com) is a privately held company with various business divisions that focus on healthy brands. Company products include fresh fruit, nuts, floral delivery, artesian water, wine and juices. TWC was founded in 1979 and has since acquired and/or founded several additional companies including Wonderful Citrus Packing LLC, Wonderful Pistachios & Almonds LLC, POM Wonderful, Teleflora LLC (Teleflora), FIJI Water Company (FIJI Water) and Justin Vineyards & Winery LLC (JVV).

In this project, TWC's corporate headquarters will take the project lead with its wholly-owned subsidiaries Teleflora, FIJI Water, and JVV participating in the training. Training will take place for these four companies in the cities of Los Angeles and Paso Robles.

TWC currently faces challenges related to a fast-paced retail and wholesale market, as well as those associated with a technology-driven environment. To remain competitive, TWC must provide workers the tools to compete in this highly demanding market and exceed customer expectations and demands. In addition, its goals are to increase operational efficiencies, expand product offerings, sales and markets, improve processes, adapt to new technology and prepare management staff to lead workers. Training will help the four companies improve efficiencies, eliminate rework and waste, communicate more effectively and standardize processes and procedures across all facilities.

There are three active ETP Agreements under the The Wonderful Company umbrella: Wonderful Citrus Packing LL, ET16-0375 (647,764 approved amount) that runs until January 31, 2018; Wonderful Pistachios and Almonds, LLC, ET17-0117 (\$749,070 approved amount) that runs until June 30, 2018; and POM Wonderful, ET17-0250 (\$97,850 approved amount) that runs until October 10, 2018.

The three companies and training are managed and operated separate and distinct, and TWC training detailed in this proposal is not related to these projects.

PROJECT DETAILS

This will be TWCs second ETP Agreement in five years. Training under the prior ETP Agreement focused on its operating systems and develop creative ways to meet customer demands. For this proposal, TWC has implemented the War On Waste program to improve and enhance productivity and quality, reduce waste and improve operation processes, manufacturing practices and customer services.

In addition, TWC has a constant business need to keep pace with industry requirements, customer demands and technological changes. Going forward, the Company will focus on increasing its internet presence, improving various business functions on the web and enhancing its internal systems to increase and improve business functions. None of the training from the prior ETP Agreement will be repeated except for training provided to newly hired trainees.

TWC is requesting ETP funding to train 195 employees. ETP funds will allow its workforce to develop the skills necessary to address these challenges and help the Companies remain competitive.

Training Plan

TWC has developed a company-wide training program across four companies to improve current business functions, expand products and services, meet customer demands and improve

efficiencies. Training will allow the companies to upgrade worker job skills, promote growth, increase sales, reduce waste and help staff effectively function while adapting to change.

Training will be provided via class/lab and videoconference by in-house subject matter experts, and vendors if needed in the following:

Business Skills (45%): Training will be offered to all occupations in communication, conflict management, customer service and product knowledge. Workers will learn all aspects of products and services, customer relations, communication and business strategies. Training will provide workers the necessary skills to increase knowledge, increase revenue and motivate employees to perform at their best.

Computer Skills (10%): Training will be offered to all occupations. Training will allow workers to effectively utilize the Company's automated systems to support and conduct better business on the internet, respond more quickly to customer needs, faster deliveries, improve customer service and manage overall business operations.

Continuous Improvement (35%): Training will be offered to all occupations. All trainees will participate in critical thinking skills, measuring for success, structured problem solving, team building, War on Waste and working as a team. This will result in improved product quality, reduced waste, and increased customer service that will attract new and existing customers.

Manufacturing Skills (10%): Training will be offered to Production Workers and Technical Support Staff. Training will provide workers with the skills and knowledge necessary to operate and maintain manufacturing equipment, ensure product quality and troubleshoot all types of equipment to avoid down time.

Director

TWC is requesting that trainees with the job title of "Director" be allowed to participate in this project. The Company reports that Directors of Marketing, Operations, and Continuous Improvement actually function as managers and do not set company policy.

Commitment to Training

The Company spends an estimated \$300,000 annually on employee training at its Los Angeles headquarters and approximately \$22,000 at the Paso Robles facility. Ongoing company training includes new hire orientation, sexual harassment prevention, first aid, and basic computer and Microsoft Office skills.

ETP funds will support and allow TWC to provide well-designed, goal oriented company-wide training. TWC will be able to implement changes throughout the organization to meet its goals. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

Training is scheduled to begin upon approval. The Company has designated two staff to oversee training and administrative responsibilities including scheduling training, enrolling, tracking hours and securing rosters. The Company will also utilize a third party administrator to assist with the administrative process for enrollment, data tracking and invoicing. (See Administrative Services below).

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET15-0481	\$86,625	06/25/15 – 06/24/17	95	155	155

Based on ETP Systems, 4,136 reimbursable hours have been tracked for potential earnings of \$64,575 (75% of approved amount). TWC projects final earnings of 100% based on training completed in March 2017.

DEVELOPMENT SERVICES

National Training Company, Inc. (NTC) in Irvine assisted with development at no charge.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined

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

8–200

Trainees may receive any of the following:

BUSINESS SKILLS

- Coaching and Mentoring
- Communication Skills
- Conflict Management
- Customer Service
- Financial Systems
- Managing Emerging Leaders
- Management Development Roundtables
- Marketing Strategies
- Presentation Skills
- Product Merchandising
- Product Knowledge
- Situational Leadership Skills

COMPUTER SKILLS

- Computer Applications
- eCommerce
- Internal Customer Applications
- Internet Applications
- Microsoft Office (Intermediate and Advanced)
- Project Software
- Software Systems
- Warehouse Management Software

CONTINUOUS IMPROVEMENT

- Critical Thinking Skills
- Leadership Skills
- Lean Manufacturing
- Measuring for Success
- Structured Problem Solving
- Team Building
- Train-the-Trainer
- War On Waste
- Working as a Team

MANUFACTURING SKILLS

- Control Systems
- Electrical Control Modules
- Emergency Planning
- Equipment Cross-Training
- Equipment Maintenance/Repair Skills
- Filling Equipment
- Food Safety
- Forklift Certification
- Good Manufacturing Practices
- Hazard Communication

- Inspection Procedures
- Labeling Systems
- Mechanical Systems
- Production Systems
- Safety Leadership*
- Standard Operating Procedures
- Troubleshooting

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

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

DELEGATION ORDER



**Retrainee - Job Creation
Training Proposal for:
Unison Hardware, Inc.**

Small Business

ET17-0500

Approval Date: May 18, 2017

ETP Regional Office: Sacramento

Analyst: D. Jordan

CONTRACTOR

- Type of Industry: Manufacturing
 - Number of Full-Time Employees
 - California: 16
 - Worldwide: 16
 - Number to be trained: 20
 - Out-of-State Competition: NAICS Code Eligible
 - Special Employment Training (SET): ☐ Yes ☒ No
 - High Unemployment Area (HUA): ☐ Yes ☒ No
 - Turnover Rate: 7%
 - Repeat Contractor: ☐ Yes ☒ No
- Priority Industry: ☒ Yes ☐ No
- Owner ☒ Yes ☐ No

FUNDING

- Requested Amount: \$22,880
- In-Kind Contribution: \$53,993

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 Priority Rate	Business Skills, Comm'l. Skills, Computer Skills, Cont. Imp., Mgmt. Skills, Mfg. Skills, PL-Mfg. Skills	16	8 - 60	0 - 8	\$1,040	*\$16.46
				Weighted Avg: 40			
2	Retrainee Job Creation SB <100 Priority Rate	Business Skills, Comm'l. Skills, Computer Skills, Cont. Imp., Mgmt. Skills, Mfg. Skills, PL-Mfg. Skills	4	8 - 60	0 - 8	\$1,560	*\$13.72
				Weighted Avg: 60			

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

- Reimbursement Rate: Job #'s 1 & 2: \$26 SB Priority
- County(ies): Sacramento
- Occupations to be Trained: Account Manager, Customer Service, Inside Sales, Finance, Purchasing, Logistics, Product Marketing Manager, Marketing, Operations Research Analyst, Owner, Product Development, Warehouse Assemblers, Warehouse Leaders
- Union Representation: ☐ Yes
☒ No
- Health Benefits: Job #1: \$1.95 per hour Job #2: \$0.22 per hour

SUBCONTRACTORS

- Development Services: N/A
- Administrative Services: N/A
- Training Vendors: Door and Hardware Institute Technical School, Chantilly, VA will provide Manufacturing Skills training.
Manex Consulting, San Ramon, will provide Manufacturing Skills training.

OVERVIEW

Founded in 2005 and headquartered in Sacramento, Unison Hardware, Inc. (Unison) (www.inoxproducts.com) designs, engineers and manufactures high end residential and commercial door hardware. Unison's primary products include door locksets, hinges, flush pulls, door closers, panic/exit devices, door stops and viewers. Customers are contractors and retailers in the construction and remodeling industries and include Belmont Hardware, Crown Millwork, Architectural Concepts and Huntington Hardware. Training will take place at Unison's single location in Sacramento. This will be Unison's first ETP contract.

Need For Training

Small manufacturers struggle due to conglomerate public corporations. In the door-hardware field, large companies such as Assa Abloy and Stanley Security retain much of the market share. To remain competitive, Unison created its own brand: Inox. This is a high-end niche product with less competition from the larger door hardware manufacturers. Unison is building a nationwide distribution network through small independent dealers to expand marketing for Inox.

Upon launching Inox, Unison abandoned its build-to-stock business model and no longer keeps large amounts of idle stock in inventory. Instead Unison is instituting a just-in-time delivery model and Lean manufacturing, where orders are built within a 5-7 days. This changes the dynamic of Unison's business and requires more training to focus on Lean manufacturing.

Unison has increased its Research and Development budget and invested in patent protection. Unison has also added new laser engraving equipment and customized pick-pack-ship stations with upgraded ERP/MRP software.

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.

Unison has committed to hiring four new employees, including Account Manager, Customer Service, Operations Research Analyst, Product Marketing Manager and Warehouse Assembler (Job Number 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

Unison is renovating the second floor of its facility, which will double its original size. Sales have also increased which has led to new customers (Spalding Hardware and Southwest Door). The increase in staff will allow the Company to meet current and projected product demand.

Training Plan

Training will be provided via Class/Lab, Productive Lab and Computer-Based Training by in-house experts and vendors in the following:

Business Skills: Training will be offered to all occupations and focus on project management, INOX residential hardware troubleshooting and time management skills.

Commercial Skills: Training will be offered to all occupations except Warehouse Assemblers. This training will focus on commercial contract skills, international payment/collection skills and new product knowledge.

Management Skills: Training will be offered to Warehouse Leaders, Account and Product Managers. Workers will receive training on how to effectively manage a team and making sure goals and objectives are met in a certain time frame.

Computer Skills: Training will be offered to all occupations except Warehouse Assemblers. Training will focus on the Company's ERP/MRP systems and data analysis tools to manage their work.

Manufacturing Skills: Training will be offered to Product Managers, Warehouse Assemblers and Leaders. Training will focus on new equipment and product line launches as well as production processes and quality standards. Training will also include Netsuite and door hardware skills.

Continuous Improvement: Training will be offered to all occupations and focus on the enhanced policies and processes to eliminate waste and improve productivity. Training topics include industry best practices, quality assurances and paperless workflow.

Productive Lab

The Panel recently adopted regulations to authorize reimbursement for training delivered in a Productive Laboratory (PL) setting. PL trainees may produce goods for profit as part of the training in the courses identified under the Curriculum. The instructor must be dedicated to training delivery during all hours of training, and special attendance rosters will be used to assist in monitoring.

Training will be offered to Warehouse Assemblers and Warehouse Leaders. PL training is needed because locksets are precise instruments that require detailed assembly with the correct parts and components. Mistakes or mishandling may cause jamming or malfunctioning which could lead to serious security and/or safety issues to clients and end users. The bulk of Unison's training will be done in a Class/lab setting, but trainees also need hands-on assembly skills.

Trainees will work with a trainer who will explain and demonstrate step by step instructions and observe while trainees perform these same tasks. Items that are assembled by trainees will be inspected and used for discussion purposes. Production will be affected because trainees will not be timed on their assembly speed, but the focus will be on the technique and understanding of the parts and components. For efficiency, Unison is requesting a 1:2 ratio and up to 14 hours so workers receive training at the same level and is more efficient for the Company. Training will be delivered by certified experienced company Assemblers.

Commitment to Training

Unison allocates approximately \$30,000 annually for training that includes new-hire orientation, staff development and safety training. ETP funds will not displace their existing financial commitment to training.

➤ Training Infrastructure

Unison has a detailed training plan in place and is ready to begin training upon approval. The Company has assigned the VP of Business Development and the HR department to oversee all training.

RECOMMENDATION

Staff recommends approval of this proposal.

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

8-60 Trainees may receive any of the following:

BUSINESS SKILLS

- Project Management Skills
- Time Management Skills
- INOX Residential Hardware Troubleshooting
- Back Order Management Skills
- Business Phone and Writing Skills
- Team Working Skills
- Account Management Skills
- Vendor Negotiation Skills
- Customer Negotiation Skills
- Architect and Designer Presentation Skills

COMMERCIAL SKILLS

- International Logistic and Shipping/Incoterms
- International Payment/Collections Skills: D/A, D/P, L/C
- Commercial Contract Skills
- OEM Project Management Skills
- E-Tailer Portal Management Skills
- New Product Knowledge
- Industry Code and Compliance Knowledge (Fire Code, ADA)

COMPUTER SKILLS

- Order Entry and Order Management Skills
- Order Fulfillments
- Optimized Bin Set-Up and Allocations
- Item Receiving and G/L Impact
- Low Inventory Analysis Skills
- Optimized BOM/KIT Building Skills
- CVS Import Skills
- Custom Reports and Searches Skills
- Custom Forms and Template Setting Skills
- Filters and Attributes for Advance Search or Report Creations
- A/R Aging Analysis Skills
- A/P Bill Pay Planning and Scheduling Skills
- Cashflow Analysis Skills
- AutoCAD/Solidworks

CONTINUOUS IMPROVEMENT

- Industry Best Practices
- Paperless Workflow
- Lean Manufacturing
- Kanban System
- Quality Assurances and Improvement Techniques
- Support Cases Activity Analysis

MANAGEMENT SKILLS (Managers/Supervisors Only)

- Target Tracking and Monitoring Skills
- “Stop Workflow Alert” – Managing Quality Issues that Stop Production
- Customer Management Follow Up
- Decision Making & Problem Solving
- Product Development Process Management
- Leadership and Team Building
- Supervisor Skills

MANUFACTURING SKILLS

- BOM Assembly Training
- In-Line Assembly Training
- Quality Control/Test Training
- Keying & Master Keying
- Laser Engraving Production
- Display Tower Assembly Training
- Safety Training

PL Hours

0-14

MANUFACTURING SKILLS (Ratio 1:2)

- Non-Keyed Passage/Privacy Tubular Lockset Assembly
- Keyed Entry Set and Deadbolt Locks Assembly
- Key Cutting, Pinning, Keyed Differ and Key Alike
- Master Keying
- Laser Engraving

CBT Hours

0-8

MANUFACTURING SKILLS

- NetSuite Overview (4 hrs.)
- Door Hardware 101 (4 hrs.)

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

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery. PL is capped at 14 hours per-trainee. CBT is capped at 50% of total training hours.