

PANEL PACKET

May 2018





NOTICE / AGENDA

MEETING TIME/PLACE

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

AGENDA

- | | | |
|------------|--|-------------------------------|
| 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• Presentation• Action Items:<ul style="list-style-type: none">▪ Priority Industries▪ Funding Allocations & Encumbrance Rate▪ Funding Caps▪ Reimbursement Rates▪ Repeat Contractor• Request motion to approve action items | Stewart Knox |
| 10:00 a.m. | Review and Action on Proposals | Gregg Griffin
Anna Nastari |
| | Presentation on Updates & Previews of Potential Program Revisions | Lis Testa |

Public Comments

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 Other changes may also occur (e.g. withdrawn).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, May 21, 2018 although the Panel may still change the order at the meeting.

North Hollywood Regional Office

Advanced Medical Management, Inc. -----	\$103,800
Amro Fabrication Corporation -----	\$96,640
CSP Fiber Services -----	\$187,318
Farmers Group, Inc. -----	\$220,200
Greater San Fernando Valley Chamber of Commerce (Amendment) -	\$355,118
Karl Storz Endoscopy-America, Inc. -----	\$234,576
Lili Mirtorabi, D.D.S., A Professional Corporation -----	\$130,680
Matthew Warren, Inc. -----	\$206,280
Menchie's Group, Inc. -----	\$96,360
Pandora Media, Inc. -----	\$750,000
Reliance Home Services, Inc. -----	\$210,000
Renew Health Consulting Services, LLC -----	\$560,852
Space Exploration Technologies Corp. -----	\$177,148
The Cheesecake Factory Bakery Incorporated (Amendment) -----	\$504,000
The Honest Company, Inc. -----	\$214,942
The SYGMA Network, Inc. -----	\$146,448
Triumph Aerostructures, LLC -----	\$235,872
Ultimate Formulations, Inc. dba Best Formulations -----	\$105,960
Zodiac Seat Shells U.S. LLC -----	\$99,136

San Diego Regional Office

Alta Newport Hospital, Inc. -----	\$142,560
Associated Construction and Engineering, Inc. -----	\$193,840
Elevate Home Health, LLC -----	\$361,550
Meggitt (San Diego), Inc. -----	\$681,000
Orange County Global Medical Center, Inc. -----	\$425,700
Orora Packaging Solutions -----	\$750,000
Profit Recovery Partners, LLC -----	\$95,480
Quick Crete Products Corp. -----	\$83,090
Stremicks Heritage Foods, LLC -----	\$136,800
VCI Construction, LLC -----	\$166,800

San Diego Regional Office (continued)

Western Digital Corporation -----	\$157,300
Waldorf Astoria Management LLC -----	\$400,938

San Francisco Bay Area Regional Office

Intuitive Surgical, Inc. (Amendment) -----	\$477,176
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Sacramento Regional Office

Bell Brother's Heating and Air, Inc. -----	\$654,180
Bonney Plumbing, LLC -----	\$249,690
Build.com, Inc. -----	\$76,600
Charlie's Enterprises, Inc. dba OK Produce Inc. -----	\$248,325
HP Hood LLC -----	\$183,760
Ingomar Packing Company, LLC -----	\$215,280
Joint Apprenticeship Committee for Operating Engineers for the 46 Northern Counties in California -----	\$948,200
Kagome Inc. -----	\$247,680
Lancaster.Burns Construction, Inc. dba LB Construction, Inc. -----	\$247,964
Safety Striping Service, Inc. -----	\$53,040

PROPOSALS APPROVED
BY DELEGATION ORDER FOR 3/13/18 – 5/11/18

≤ \$50,000

**Approved
Date** **Approved
Amount**

North Hollywood Regional Office

Dauntless Industries, Inc. dba Dauntless Molds	05/08/18	\$49,764
Discount Two Way Radio Corporation	04/25/18	\$34,320
GPL Solutions LLC	03/14/18	\$40,560
J & J Processing, Inc.	05/07/18	\$49,920
Luminit LLC	05/08/18	\$49,816
OMNI Consulting Solutions LLC	04/04/18	\$36,960
Rebas, Inc. dba Toyota-Lift of Los Angeles	04/23/18	\$48,600
United Exchange Corp. (Amendment)	05/11/18	\$39,910

San Diego Regional Office

Advanced Composite Products and Technology, Inc.	04/23/18	\$49,842
ATS Workholding, LLC dba ATS Systems	04/23/18	\$49,920
Bayley Construction, LP	03/13/18	\$24,960
Casco Contractors, LLC	03/29/18	\$49,504
Compound Solutions Inc.	04/03/18	\$19,690
Dewell Enterprises, Inc. dba Commercial Bath Refinishing	03/29/18	\$41,600
H & A Transmissions, Inc.	05/09/18	\$26,000
InspecTesting, Inc.	03/21/18	\$44,330
Rockstar Recruiting LLC dba Staff Rehab	04/03/18	\$23,232

San Francisco Bay Area Regional Office

BVOH, LLC	05/09/18	\$34,848
Oven Fresh Bakery, Inc.	03/27/18	\$17,368

Sacramento Regional Office

Always Home Nursing Services, Inc.	04/12/18	\$48,000
GS Williams, Inc. dba Archoustics West	03/12/18	\$32,760



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Discount Two Way Radio Corporation
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H & A Transmissions, Inc.
InspeCTesting, Inc.
J & J Processing, Inc.
Luminit LLC
OMNI Consulting Solutions LLC
Oven Fresh Bakery, Inc.
Rebas, Inc. dba Toyota-Lift of Los Angeles
Rockstar Recruiting LLC dba Staff Rehab
United Exchange Corp. (Amendment)



M e m o r a n d u m

To: Panel Members

Date May 24, 2018

From: Stewart Knox
Executive Director

File: Panel Memo Doc.

Subject: **Directions to Meeting Site**

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

**California Environmental Protection Agency
Sierra Hearing Room, 2nd Floor
1001 I Street
Sacramento, CA 95814**

Telephone (916) 327-5640 (ETP Central Office)
FAX: (916) 445-5972 (ETP Central Office)

Directions to the California Environmental Protection Agency - Sierra Hearing Room

From Sacramento International Airport:

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

From San Francisco

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



M e m o r a n d u m

To: Panel Members

Date May 24, 2018

From: Stewart Knox
Executive Director

File: Mtg. Site Memo

Subject: **Future Meeting Sites**

<p>May 24, 2018</p>	<p>California Environmental Protection Agency Time: 09:30 AM Sierra Hearing Room, 2nd Floor 1001 I Street Sacramento, CA 95814</p>
<p>June 22, 2018</p>	<p>California Environmental Protection Agency Time: 09:30 AM Sierra Hearing Room, 2nd Floor 1001 I Street Sacramento, CA 95814</p>
<p>July 27, 2018</p>	<p>California Environmental Protection Agency Time: 09:30 AM Sierra Hearing Room, 2nd Floor 1001 I Street Sacramento, CA 95814</p>
<p>August 24, 2018</p>	<p>California Environmental Protection Agency Time: 09:30 AM Sierra Hearing Room, 2nd Floor 1001 I Street Sacramento, CA 95814</p>



**STATE OF CALIFORNIA
EMPLOYMENT TRAINING PANEL**
California Environmental Protection Agency
1001 I Street
Sierra Hearing Room, Second Floor
Sacramento, CA 95814
March 23, 2018
(916) 327-5640

PANEL MEMBERS

Barry Broad
Chair

Janice Roberts
Vice-Chair

Gloria Bell
Member

Will Koch
Ex-Officio Member

Gretchen Newsom
Member

Jeff Robinette
Member

Sam Rodriguez
Member

Ali Tweini
Member

Executive Staff

Stewart Knox
Executive Director

Michael A. Cable
Legal Counsel

STATE OF CALIFORNIA
EMPLOYMENT TRAINING PANEL
California Environmental Protection Agency
1001 I Street, Sierra Hearing Room, Second Floor
Sacramento, CA 95814
March 23, 2018

I. PUBLIC PANEL MEETING CALL TO ORDER

Chairman Barry Broad called the meeting to order at 9:28 a.m.

II. ROLL CALL

Present

Barry Broad
Gretchen Newsom
Janice Roberts
Sam Rodriguez
Jeff Robinette
Ali Tweini
Gloria Bell

Absent

Will Koch

Executive Staff Present

Stewart Knox, Executive Director

Legal Counsel

Michael A. Cable

III. AGENDA

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

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

Motion carried, 6 - 0.

IV. MINUTES

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

ACTION: Ms. Newsom moved and Mr. Tweini seconded the motion that the Panel approve the Minutes from the February 22, 2018 meeting.

Motion carried, 6 - 0.

V. REPORT OF LEGAL COUNSEL

There was no report from Legal Counsel.

VI. REPORT OF THE EXECUTIVE DIRECTOR

Stewart Knox, Executive Director, reported that today's Panel Meeting concerns projects totaling just over \$8.3M; approximately \$815K of which are Delegation Orders, for a total of just over \$9M.

It was reported that the following people are here today to present Proposals: Gregg Griffin, North Hollywood Regional Office Manager, and Anna Nastari, San Francisco Bay Area Regional Office Manager.

It was reported, regarding the Budget for Alternative and Renewable Fuel and Vehicle Technology Program (ARFVTP), that ETP is in partnership with the California Energy Commission with \$2M approved through an Interagency Agreement; that ETP has had four ARFVTP proposals in the last few months totaling over \$900K, one of which was approved for over \$620K, leaving approximately \$0.5M remaining for ARFVTP proposals this year.

It was reported, regarding Core Funds for Fiscal Year (FY) 2017/18, that upon the Panel approving the just over \$8.3M in projects scheduled for today's Panel Meeting, ETP will have approximately \$10.3M for the remainder of FY 2017/18.

It was reported regarding Delegation Orders, that all such project proposals are capped at \$50,000; that all such project proposals are to be approved by the Executive Director on a continuous flow basis; and that the 23 projects subject to Delegation Orders for today's Panel Meeting total just over \$815K.

It was reported, regarding 2017/18 total program funding to date, that approximately 376 projects have been submitted to the Panel, with a value of just over \$120M; and if all project proposals for today's Panel Meeting are funded today, that the Panel will have approved 376 projects, with a value of just over \$84M.

It was reported, regarding applications for contracts that are remaining in the Regional Offices: Single Employer Contract requests are at \$40M in demand; \$55K in allocation. Multiple Employer Contract (MEC): requests are at \$5.3M in demand; \$3.3M in allocation. Small Businesses requests are at \$4.4M in demand; \$188K in allocation. Critical Proposals are at \$0.00K in demand; \$3.8M in allocations. Apprenticeship programs are at \$4.6M in demand; \$2.9M in allocation. Overall demand is approximately \$54M.

It was reported, the number of total projects in FY 2017/18 in the Regional Offices is 313; that the total number of projects currently in the Applications and Assessment Unit is 54; and that the number of total projects is 367.

It was reported that Staff is working hard to get the projects assigned out to the Regional Offices and that to date about 80% of the projects have been assigned to the Regional Offices.

VII. LEGISLATIVE UPDATE

A Legislative Update memorandum was provided to Panel Members. It was reported that there is a significant amount of legislation concerning Workforce Development and Cannabis issues in this Legislative Update. It was also reported that one bill, AB-2420 (Quirk-Silva), specifically identifies ETP in amending certain Unemployment Insurance Code sections under ETP’s legislation to include soft skills training. ETP worked directly with the author of AB-2420 (Quirk-Silva) in regards to the current version of the bill by adding soft skills to the already stated job-related basic and literacy skills training.

VIII. ACKNOWLEDGMENTS

ETP Executive Director, Stewart Knox, took a moment to announce that after 18 years of State service, Stephen Runkle is retiring at the end of March 2018. Mr. Runkle has been with ETP for 13 years, serving as Audit Manager for the last 9 years. It was reported, under Mr. Runkle’s management, the Audit Unit completed 193 audits resulting in \$1.6M unearned funds being returned to ETP. ETP thanks Mr. Runkle for his service and contributions and wishes him well on his retirement.

Panel Member Sam Rodriguez asked to take a moment to remember the Governor’s “Right-Hand Person,” Nancy McFadden who passed away last evening. She was 59 years old and served two governors.

IX. MOTION TO ADOPT CONSENT CALENDAR PROJECTS

Chairman Broad asked for a motion to adopt Consent Calendar Items #1 through #9.

Esplanade Builders, Inc.....	\$ 77,526
Hall Ambulance Service, Inc.....	\$242,550
Hansen Engineering Co.....	\$ 55,380
Hydratech, LLC.....	\$ 59,280
Johanson Dielectrics, Inc.....	\$ 99,000
LPL Financial, LLC.....	\$216,000
MSWest Enterprises dba Certified Collision Centers.....	\$249,870
Puritan Bakery, Inc.....	\$ 77,040
Steve’s Oilfield Service, Inc. dba SOS Crane & Trucking.....	\$ 77,600

ACTION: Mr. Tweini moved and Ms. Bell seconded the motion to approve the consent calendar for Items #1 through #9.

Motion carried, 6 – 0.

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

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

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

Motion carried, 6 - 0.

XI. REVIEW AND ACTION ON PROPOSALS

Single Employers

Tab # 10 – L-3 Electron Devices, Inc.

Mr. Griffin presented a proposal on behalf of L-3 Electron Devices, Inc. (L-3), in the amount of \$898,104. Founded in 1948, L-3 manufactures high reliability communication satellites and subsystems to commercial space, and defense customers worldwide. The Company's parent company is L-3 Technologies, headquartered in New York, New York. L-3 has a total of 76 facilities located in 20 states. California locations include Anaheim, Carlsbad, Folsom, Goleta, Menlo Park, Poway, San Carlos, San Diego, San Leandro, Santa Rosa, Simi Valley, Spring Valley, Sylmar, and Torrance. Products manufactured at the Torrance facility include satellite RF amplifiers, microwave electron devices, and other related products. This will be the Company's second ETP Agreement, its second in five years.

Mr. Griffin introduced Glenn Grindstaff, Vice President, Human Resources & Administration, and Paul Johnson.

During discussion, it was questioned and reported that approximately 35-45% of the employees working for L3 are of a military/veteran status, and it was stated that such military/veteran persons will benefit from the training proposed here.

It was stated there is often general concern and additional scrutiny when a return applicant requests a substantially higher contract amount in relation to their previous contract amount; as is the case here, since the contract amount requested went from \$350K to \$900K. However, since it was reported, L3's market share went from 20-60%, with an additional 140 new employees, it was suggested that these statistics demonstrate the success of the previous contract, which will continue to grow, given the increased contract amount provided in the current contract. L3 reported that it plans to continue its growth with this new contract.

ACTION: Ms. Bell moved and Ms. Newsom seconded the approval of the proposal for L-3 Electron Devices, Inc. in the amount of \$898,104.

Motion carried 6- 0.

Tab # 11 – The Spaceship Co., LLC

Mr. Griffin presented a Proposal for The Spaceship Co., LLC (TSC), in the amount of \$653,000. TSC founded in 2005, is wholly owned by Galactic Ventures. Headquartered in Mojave Air and Space Port in Mojave, the Company has two additional facilities in Mojave. Training under this Agreement will only include trainees at the Company headquarters and their additional facility located in Mojave. This will be TSC's first ETP Agreement.

Mr. Griffin introduced Daniel Miller, People Development Manager.

During discussion, after being asked about their business model and the nature of the intended use of the aircraft being manufactured, Mr. Miller reported that TSC is in the space tourism business, and that TSC builds and designs aircrafts to take people to space. Mr. Miller also reported that Galactic Adventures is a holding company under Virgin; that space tourism is a dream and big endeavor of Richard Branson; and that all operations are located in Mojave, California.

It was questioned since this will be TSC's first contract, who will be in charge of project administration. Mr. Miller confirmed that he will be the project administrator, having worked with TSC for 8 years, and having already successfully administered another ETP program.

ACTION: Mr. Rodriguez moved and Ms. Bell seconded approval of the proposal for The Spaceship Co., LLC, in the amount of \$653,000.

Motion carried, 6 - 0.

Tab # 12 – H.M. Electronics, Inc.

Mr. Griffin introduced a Proposal on behalf of H.M. Electronics, Inc. (HME), in the amount of \$326,688. Founded in 1971 and headquartered in Poway, HME is a privately owned company that provides industry-leading wireless communication equipment, timer and software products to the quick service restaurant industry, high school and collegiate athletic programs. This proposal will also include two HME subsidiaries: Clear Com LLC located in Alameda; and HME Hospitality & Specialty Communications, Inc. (HME Hospitality). HME will act as the lead employer for the purposes of this ETP project.

Mr. Griffin introduced Jack Farnan, Vice President of Human Resources.

During discussion, it was reported that HME's last contract only earned 78% of the money; which although above the 70% threshold usually used for right sizing of contracts, raises concerns about the success of HME's training program. In response, Mr. Farnan explained that there was too much corporate activity and growth during the time of the last contract, and that these issues will not impact the success of the contract at issue now.

During discussion, it was questioned whether corporate activity and growth issues will adversely impact the current contract, since HME is reporting continued growth, in addition to new buildings, more corporate movement, and creating additional infrastructure. In response, Mr. Farnan restated that such issues will not prevent success of the current contract, and further explained that he and a new training manager in charge of organizational effectiveness are committed to obtaining 100% with the current contract application. Mr. Farnan also stated that they have implemented a professional development plan that includes quarterly check-ins in order to track the progress of each employee's training; and that they have invested in a learning management system that is going to provide over 1,000 computer-based training for employees.

During discussion, it was clarified there are two major business units to HME; One that serves the restaurant quick services, fast casual industry (HFC), and a second that develops and manufactures professional production wireless communications systems (Clear Com).

ACTION: Ms. Roberts moved and Mr. Tweini seconded approval of the proposal for H.M. Electronics, Inc., in the amount of \$326,688.

Motion carried, 6 - 0.

Tab # 13 – Karma Automotive LLC

Mr. Griffin introduce a Proposal on behalf of Karma Automotive LLC (Karma), in the amount of \$302,400. Headquartered in Irvine, Karma Automotive, LLC manufactures luxury gas-electric, plug-in electric (hybrid) automobiles. This is Karma's second ETP Agreement, and the second in the last five years.

Mr. Griffin introduced Warren Ernst, Training & Development.

During discussion, it was clarified the wage range for the operations staff was generally \$1,515 to \$4,500; and the wage range for the manufacturing staff was generally \$1,433 to \$5,500. Mr. Ernst reported that most workers are at the higher end of the wage ranges; that approximately 125 workers would be at the low end versus 350 workers at the high end.

ACTION: Ms. Roberts moved and Mr. Robinette seconded approval of the proposal for Karma Automotive, LLC, in the amount of \$302,400.

Motion carried, 6 - 0.

Tab # 14 – Orange County Global Medical Center, Inc. WITHDRAWN

Tab # 15 – Reborn Cabinets

Mr. Griffin introduced a Proposal on behalf of Reborn Cabinets (Reborn) in the amount of \$547,560. Founded in 1983, Reborn is a family-owned business that designs, manufactures, and installs custom cabinetry in kitchens and baths for homeowners. The Company's headquarters is located in Anaheim, which includes a showroom and their manufacturing operation. Reborn builds all of the cabinetry in its Anaheim facility where they also utilize specialized equipment to create and apply a catalyzed conversion varnish finish that improves the quality of their products. The Company has four standalone showrooms in Pleasanton, Torrance, Lake Forest, and San Diego. In addition, Reborn is an approved sell, furnish and install vendor for the Home Depot at numerous stores throughout California and the exclusive distributor of Kohler Brand and Jacuzzi Brand Walk-In Tubs for the entire state of California and Nevada.

Training will be for the employees at the Anaheim headquarters and the Pleasanton, Torrance, Lake Forest and San Diego showrooms. Reborn qualifies for standard retraining as a priority industry manufacturer.

Mr. Griffin introduced Vince Nardo, President and Joann Blankus.

During discussion, it was reported that Reborn's employees very much enjoyed and appreciated the training; and Mr. Nardo commented on Reborn's commitment to more training and professional development of its employees.

During discussion, in addition to Reborn's founder, it was estimated that at least approximately 15-20% of Reborn's workforce is military/veteran. Additionally, it was reported that Reborn attempts to uplift its employees by encouraging training and pairing lead installers with new installers. As such, Mr. Nardo provided an overview of Reborn's 3-week training program provided to new installers.

ACTION: Ms. Roberts moved and Mr. Tweini seconded approval of the proposal for Reborn Cabinets in the amount of \$547,560.

Motion carried, 6 - 0.

Tab # 16 – Cintas Corporation No. 3

Ms. Nastari presented a Proposal on behalf of Cintas Corporation No. 3 (Cintas) in the amount of \$301,185. Founded in 1929, and headquartered in Cincinnati, OH, Cintas provides corporate branded uniforms and products such as entrance mats, cleaning supplies, promotional products, safety supplies, and cleaning services to a wide variety of industries such as food service, automotive, air transport, hospitality, health care, and manufacturing and education.

Ms. Nastari introduced Justin Knight, Director of Human Resources.

During discussion, it was reported that this is Cintas' first contract with ETP; and since this contract involves 10 locations, Cintas is specifically advised to keep in close contact with ETP Staff in order to receive guidance with ETP's various recordkeeping requirements. Mr. Knight stated his appreciation for the advice, and explained that he was already in communication with ETP Staff regarding training rosters and documentation.

During discussion, it was also suggested that communication is going to be key in successfully administering this contract, which will include communicating with a significant amount of people at all 10 locations.

ACTION: Mr. Tweini moved and Ms. Newsom seconded approval of the proposal for Cintas Corporation No. 3, in the amount of \$301,185.

Motion carried, 6 - 0.

Tab # 17 – Del Monaco Foods, LLC dba Kettle Cuisine

Ms. Nastari introduced a Proposal on behalf of Del Monaco Foods, LLC dba Kettle Cuisine (Kettle Cuisine), in the amount of \$384,000. Founded in Massachusetts in 1986, expanded to California in 2016 by buying the Del Monaco Foods plant in Morgan Hill. The Company makes soups in small batches from natural foods, packages it in others' brands and ships it refrigerated frozen. Kettle Cuisine currently supplies retailers such as Whole Foods, Trader Joe's and Erik's Delis with its soups, and foodservice companies that see to restaurants, institutions and retailers.

Ms. Natari introduced Maria Marsilio, Human Resource Manager; Pete McKenzie, Site Director; and Steve Duscha.

During discussion, it was clarified that, although Kettle Cuisine can be a seasonal business that has a temporary workforce, said temporary workforce will not be part of this contract. Additionally, Kettle Cuisine is attempting to move away from needing a temporary workforce in the first place, by cross-training workers into alternative positions, and developing more year round culinary items to produce. Temporary workers maintain no connection with the company when their work is completed.

During discussion, since this is Kettle Cuisine's first contract with ETP, it was advised that Kettle Cuisine stay in close contact with its representative and ETP Staff. Mr. McKenzie indicated that while this is Kettle Cuisine's first contract, Mr. McKenzie has actually brought four other contracts before the Panel regarding Paramount Citrus in the Central Valley.

ACTION: Mr. Rodriguez moved and Mr. Robinette seconded approval of the proposal for Del Monaco Foods, LLC dba Kettle Cuisine in the amount of \$384,000.

Motion carried, 6 - 0.

Tab # 18 – Headway Technologies, Inc.

Ms. Nastari introduced a Proposal on behalf of Headway Technologies, Inc. (Headway), in the amount of \$344,880. Founded in 1994 and based in Milpitas, Headway designs and manufactures recording head for high performance hard disk drives used in portable computers and computer servers. Headway continues to research and develop the next generation of disk drives to maintain large customer accounts with Toshiba, Seagate and HGST.

The Company has four locations in Milpitas where the proposed class/lab and productive lab training will take place for both incumbent workers and newly hired staff. The training targets 326 current employees and 75 Job Creation retrainees. Headway is a manufacturer eligible for the priority reimbursement rate.

Ms. Nastari introduced Jeanna McCoy, Employee Relations Manager, and Shelly Lal, Training Development Supervisor.

There were no questions from the Panel.

ACTION: Ms. Roberts moved and Mr. Tweini seconded approval of the proposal for Headway Technologies, Inc., in the amount of \$344,880.

Tab # 19 – ISEC, Incorporated

Ms. Nastari introduced a Proposal on behalf of ISEC, Incorporated in the amount of \$337,600. Founded in 1967 and headquartered in Colorado, ISEC, Incorporated (ISEC), is a construction company that focuses on woodwork projects. ISEC provides innovative solutions in architectural woodwork, ornamental metals, doors, frames & hardware, laboratory and medical furniture. The Company works with major commercial subcontractors on construction projects ranging from schools, airports and hospitals. Its main customers are general contractors, architectural firms, governmental agencies and other commercial property owners. ISEC began providing furniture and athletic equipment in schools. It has since expanded into the healthcare and laboratory industries. It has facilities across the nation with California facilities in Dixon, South San Francisco, Fremont, La Palma, Ontario, Thousand Oaks and San Diego where training will occur.

Ms. Nastari introduced John Fritschler, Director of Education; Mike Polanchyck, Executive Vice President; and Jeff Long, Regional Manager.

During discussion, it was reported that ISEC is waiting for a letter of approval from the Carpenters of Southern California. ISEC reported that it has a great relationship with the Carpenters Union, that ISEC has a letter of approval from the Carpenters of Northern California, but that the letter of approval from the Carpenters of Southern California is delayed due to pending contract negotiations. ISEC notes that AGC will also be providing a letter of support after having communicated with the union.

During further discussion, since this is ISEC's first contract, ISEC was advised to stay close and work with ETP Staff in administering the contract. Mr. Fritschler stated that they will do so, and outlined how he intends to administer the contract with regional HR coordinators.

During further discussion, it was stated that ISEC is a Colorado corporation that is really a California-based company. Mr. Fritschler stated that ISEC has a small corporate office in Colorado, however, the majority of ISEC employees and business operations are here in California.

ACTION: Mr. Roberts moved and Ms. Bell seconded approval of the proposal for ISEC, Incorporated in the amount of \$337,600.

Motion carried, 6 - 0.

Tab # 20 – Certified Stainless Service, Inc., dba West-Mark

Ms. Nastari introduced a Proposal on behalf of Certified Stainless Service, Inc., dba West-Mark (Certified Stainless), in the amount of \$282,000. Founded in 1967, and headquartered in Ceres, Certified Stainless manufactures tanks and trucking equipment used to transport and deliver liquids. The Company's products are used by customers in the Emergency, Petroleum and Energy, Construction, Military, and Food and Agriculture Industries.

Certified Stainless has four facilities in California, Atwater, Bakersfield, and two in Ceres. (The Company also has a facility located in Fairbanks, Alaska.) All facilities located in California will receive training under this proposal.

Ms. Nastari introduced Bill Doughty, CFO of West Mark.

During discussion, it was reported that Certified Stainless will be training 10 veterans, and that although there is a service facility serving customers in Alaska, all development, engineering, training, and production takes place in California.

ACTION: Ms. Roberts moved and Mr. Robinette seconded approval of the proposal for Certified Stainless Service, Inc., dba West-Mark in the amount of \$282,000.

Motion carried, 6 - 0.

Tab # 21 – Covenant Care California, LLC

Ms. Nastari introduced a Proposal on behalf of Covenant Care California, LLC (Covenant Care), in the amount of \$749,496. Founded in 1994 and headquartered in Aliso Viejo, Covenant Care and its affiliates specialize in skilled nursing care and rehabilitation services such as short-term and long-term nursing care, medication management and development disabilities.

Covenant Care will serve as the lead employer in this proposal with its six affiliates: Covenant Care Capitola, LLC; Covenant Care Encinitas, LLC; Covenant Care La Jolla, LLC; Covenant Care Lodi, LLC; Covenant Care Mission, LLC; and Covenant Care Morgan Hill, LLC. Training under this proposal will include 21 locations throughout California.

Ms. Nastari introduced Jacqueline Turner, RN, Director of Education and Regulatory Affairs; and Bill Parker, President, CEO.

During discussion, it was reported that Covenant Care had an approximately 70% completion rate on their last contract. In order to explain the low completion rate on their last contract, Ms. Turner stated that there were issues with identifying original rosters from copies in order to secure credit, and that a business decision was made to back out 1,500 training hours, which would have put Covenant Care at more than the maximum, in lieu of the time and expense associated with trying to fix the roster issues. Ms. Turner also reported that Covenant Care contracted with NTS, who will assist Covenant Care with recordkeeping and other issues to avoid roster problems in the future.

During further discussion, Ms. Turner explained that there is no re-training of people due to ineffective training; rather, Covenant Care has been developing different ways of training in order to respond to the different ways people receive information.

During further discussion, it was stated that approximately 27 veterans were hired in 2016 and an additional 27 veterans were hired in 2017. At this time, approximately 10% of all Covenant Care employees are veterans.

During further discussion, Ms. Turner outlined the steps undertaken to ensure a higher success rate on the current contract; including longer training sessions, more training sessions, and hiring NTS to focus on the recordkeeping while they focus on the training.

During further discussion, it was recognized that an application such as this one is typically right-sized to the amount of money earned in the previous contract, but given the discussion, it was suggested that this contract be right-sized by 80% (or \$600,000).

ACTION: Mr. Broad moved and Ms. Newsom seconded approval to right-size this proposal for Covenant Care California, LLC in the amount of \$600,000.

Motion carried, 6 - 0.

Multiple Employer Contracts

Tab # 22 – Santa Monica Community College District

Mr. Griffin presented a Proposal on behalf of Santa Monica Community College District (SMC) (Employers Group) in the amount of \$ 949,688. SMC is a two-year public community college located in the City of Santa Monica. SMC, accredited by the Western Association of

Schools and Colleges, serves approximately 33,000 students and offers over 90 fields of study. This will be SMC's ninth ETP Agreement, its fourth within the last five years.

Mr. Griffin introduced Sasha King, Director, Business Development and Small Business Support and Jennifer Landen.

There were no questions from Panel.

ACTION: Ms. Roberts moved and Mr. Tweini seconded approval of the Proposal for Santa Monica Community College District in the amount of \$949,688.

Motion carried, 6 - 0.

Tab # 23 – Northern California Elevator Industry Joint Apprenticeship and Training Committee Trust Fund

Ms. Nastari introduced a Proposal on behalf of Northern California Elevator Industry Joint Apprenticeship and Training Committee Trust Fund (NorCal Elevator JATC), in the amount of \$744,600. Established in 2004, NorCal Elevator JATC serves 540 Apprentices and 841 Journeymen Elevator Constructors and Mechanics. Workers are represented by the International Union of Elevator Constructors Local 8 which covers 46 northern California counties. Employers are represented by the National Elevator Bargaining Association and the Elevator Contractors of America. Workers are employed in companies that build, install, repair, modernize, and service elevators and escalators.

This is NorCal Elevator JATC's first ETP Agreement. The request is driven by the growing volume of new construction, and need for long-term service and repair of elevators and related equipment in northern California.

Ms. Nastari introduced Jim Leonard, National Elevator Industry Educational Program (NEIEP) Area Coordinator; and Greg Hardeman, JATC Chairman.

During discussion, Mr. Leonard stated that there is a commitment to veterans, and that many of their veterans are small business owners.

ACTION: Ms. Roberts moved and Mr. Tweini seconded approval of the Proposal for Northern California Elevator Industry Joint Apprenticeship and Training Committee Trust Fund in the amount of \$744,600.

Motion carried, 6 – 0.

XII. PUBLIC COMMENT

Ms. Newsom reported on the Subcommittee meeting held.

It was reported that the 2018 STEPS Grant was in full force, receiving summaries of all the grant proposals and applications as part of a solicitation proposal process. Proposals were scored by two ETP Staff Members, two Department of Rehabilitation Staff Members, and one California Workforce Development Board Staff Member. It was further reported that a total of \$4.6M is in demand to serve 920 students with disabilities. It was explained that applicants were divided into two tiers: Tier One applicants are recommended for funding immediately. Tier Two applicants will be recommended for funding after an additional \$500K becomes available.

It was further reported that the Subcommittee unanimously recommended approval of the 2018 STEPS Grant applications as outlined with the request that minimum wage for the students be set at \$11.50/hour, or \$.0.50 above the California Minimum Wage to be negotiated with the different applicants.

ACTION: Mr. Tweini moved and Mr. Broad seconded approval of the 2018 STEPS Grant per project proposals as outlined.

Motion carried, 6 – 0.

It was further reported that some items that would likely be considered at the May Panel Meeting were to include Substantial Contribution, Broker Model, non-traditional apprenticeship programs and reimbursement rates.

XIII. MEETING ADJOURNMENT

Meeting adjourned at 11:04 a.m.

Single Employer Contractor

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

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

These features apply to core program funding.

Multiple Employer Contractor

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

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

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 \$50,000 or less, and (2) single proposals for \$50,000 or less.
- This procedure allows projects to be approved on a flow basis. This process recognizes the need for just-in-time training, and reduces or eliminates the need for a Consent Calendar.
- An ETP130 and Curriculum is prepared for each proposal. They are reviewed and approved after the Executive Director signs off. The effective date will be the date specified by the Field Analyst and if no date is specified, the earliest effective date of contract is the day after the project is approved by the Executive Director.
- A copy of approved Delegation Orders is included in each month's Panel Packet, for projects approved prior to the Panel meeting, as an information item.



Memorandum

To: Panel Members Date: May 24, 2018

From: Stewart Knox, Executive Director File:

Subject: Action Items: Priority Industries, Funding Allocations & Encumbrance Level, Funding Caps, Reimbursement Rates, Repeat Contractor Rule

Item #1: Action on Priority Industries

ETP staff recommends keeping the current ETP Priority Industry List unchanged.

Priority Industries as follows:

- Allied Healthcare
- Agriculture
- Biotechnology/Life Sciences
- Construction
- Goods Movement & Transportation/Logistics
- Green/Clean Technology
- Information Technology Services
- Manufacturing/Food Production
- Multi-Media/Entertainment
- Technical Services.

Item #2: Action on Funding Allocations & Encumbrance Level

ETP staff recommends the following funding allocations and encumbrance level:

- Single Employer: \$48,000,000
- MECs: \$24,000,000
- Small Business: \$6,000,000
- Critical Proposals: \$5,000,000
- Apprenticeship/non-traditional: \$20,000,000
- Total: \$103,000,000
- Encumbrance Level: move from 38% to 40%

Item #3: Action on Funding Caps

ETP staff recommends the following Funding Caps:

Contractor Category	Current FY 17/18 Caps	Proposed FY 18/19 Caps
MECs (Includes Apprenticeships)	\$950 K (w/ Apprenticeships at \$450 K per sponsor)	\$950 K/\$1.8 M*
Single Employers (Includes Small Business)	\$750 K (w/ Small Business at \$50 K)	\$900 K
Critical Proposals	\$900 K	\$900 K
Delegation Orders	\$50 K	\$75 K

* MECs over \$950 K need to wait 18 months from start of contract term before submitting new Pre-App

Item #4: Action on Reimbursement Rates

ETP staff proposes a new Fixed-Fee Reimbursement Rate Table, in order to simplify our existing rate structure and to provide most training and trainee categories with a raise in reimbursement rates. See rate table below:

The new rates will become effective for all projects (and new amendments) with a term start date/effective date of 7/1/18 or later.

<u>Rate Category</u>	<u>Reimbursement Rate</u>
CBT	\$9
Apprenticeship (pre-apprentices & apprentices)	\$21
Non-Priority Retrainees	\$23
Special Populations: i.e.; Priority Projects, Critical Proposals, New Hires, RJC, Small Business, Veterans, Advanced Technology, MEC Entrepreneurial, Journeymen, Alternately Funded Projects, Ex-offender/At-Risk Youth, CNA to LVN, Medical Skills (both types)	\$26

Item #5: Action on new Repeat Contractor Rule

ETP staff recommends adoption of a new Repeat Contractor Rule, effective 7/1/18, as follows:

- Enact as a Pilot Program
- Impose a time limit as follows:

- Contractors may have a first, and then a second contract with no waiting period.
- After the ending contract term date of the second contract, contractors must wait 9 months before submitting a Preliminary Application for a 3rd contract.
- Both 1st & 2nd contract must reach at least a 75% completion rate before a new Pre-App for a 3rd contract will be accepted.
 - o If either the 1st or 2nd contract do not meet the 75% threshold, they will be right-sized accordingly
- Clock resets with the start of the 3rd contract.
- A contractor may earn a maximum of \$2.5 M over the course of four (4) contracts.
- Critical Proposals, Alternately Funded Projects, Small Business Projects, and all MECs (including JATCs) are exempt from the Repeat Contractor Rule
 - o Since MECs are exempt, they must have at least four (4) Participating Employers on their contract.
 - o Anyone desiring an exemption from the Repeat Contractor Rule may request an exemption with ETP Executive Staff.



**TRAINING PROPOSAL FOR
ADVANCED MEDICAL MANAGEMENT, INC.
18-0551**

Panel Meeting Date: 05/24/2018
Regional Office: North Hollywood Regional Office
Analyst Name: L. Vuong
Type of Proposal: Single Employer
Funding Source: SET

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 103,800	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 103,800	N/A	\$ 0.00	\$ 185,886.00

APPLICANT PROFILE

Company Summary	Advanced Medical Management, Inc. (AMM) (www.amm.cc) provides medical and healthcare management services for independent physician associations, commercial and government agencies.		
Industry Sector(s)	Healthcare Services		
Priority Industry	Yes		
No. Employees (Applicant)	State: 165	US: 165	World Wide: 165
Turnover Rate (Applicant)	0.00 %		
Repeat Contractor	Yes		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Training will focus on complex healthcare challenges and requirements, enable staff to adapt to new technologies, improve customer services for higher quality care, and upgrade the skills of its workforce to remain competitive.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	130	\$ 18.00	30	\$ 540	8 - 200
2	Job Creation – Retrainee Initiative Program, Retrainee	24	\$ 20.00	70	\$ 1400	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 1982 and headquartered in Long Beach, AMM is accredited by the Joint Commission on Accreditation of Healthcare Organizations and is certified by Medicare/Medi-Cal and numerous Health Maintenance Organizations to provide medical management services including case management, claim processing, payment review, and medical authorization and administrative services. The Company also facilitates home health, palliative, long term and hospice care. AMM operates as a medical management company for independent physician associations and also services a variety of commercial and government agency clients throughout California.

Currently, AMM manages over 135,000 patients and has expanded its services to Hawaii and Seattle. In the next two years, AMM plans to further expand its services to Texas and Virginia.

2. Current Training Project Details

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

Purpose of Training	<p>This will be the Company's second ETP Agreement. With the success of its prior ETP Agreement, AMM has grown from a small business with 95 employees to a large employer with 165 employees in California. In the past year, the Company experienced a 100% growth in business and a 25% increase in its workforce. In addition, the Company is currently implementing a new software system, Cerecons, which will enhance and improve services and streamline information flow and reporting to meet patients' and providers' expectations.</p> <p>AMM's business environment is rapidly changing due to a constantly changing healthcare industry, customer demands, increase in workforce and technological advances. These standards are continually changing and AMM must keep pace. As its business and workforce grows, AMM must train its employees to accommodate various business needs and services. This requires extensive training to put new technology, processes and practices into place quickly and efficiently, while maintaining superior quality standards.</p> <p>In the previous project, incumbent workers were trained on basic healthcare standards and requirements, internal systems, and general business operations such as customer services, reducing errors, and improved efficiency. In this proposal, AMM will focus on more complex healthcare challenges, exceeding customer expectations for higher quality care, new software, standardize processes and procedures across all departments and process</p>
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PROPOSED TRAINING PROJECT DETAILS

	improvement training will continue, but at a much higher level. Training will support new patients, providers, upgrade workforce skills, and keep up with technological and healthcare requirements. Workers will gain new skills and the experience needed for optimal job performance which will attract new customers and promote continued growth. Training from prior ETP Agreement will not be duplicated. Training will take place at AMM's Long Beach facility.
Training Infrastructure and Administrative Plan	AMM has designed a Human Resources Staff and Department Heads to oversee training and administration including managing and scheduling training delivery and documentation. AMM has also retained Training Funding Source, to assist with administrative processes for enrollment, data tracking and invoicing. Training is scheduled to begin upon Panel approval; and will be delivered on-site by in-house staff and outside vendors to be determined later.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
Training will be provided to all occupations in Business, Computer and Continuous Improvement Skills. Medical Skills (Didactic) will be provided to Licensed Vocational Nurses and Registered Nurses.	

4. Additional Company or Training Project Details

Retrainee-Job Creation

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

To support business growth, AMM is expanding business capacity by adding newly hired employees. The Company has committed to hiring 24 new Claim Examiners, Coordinators and Information

PROPOSED TRAINING PROJECT DETAILS

Technology Staff at its Long Beach location over the next two years. AMM will focus on training Job Creation trainees in high level job skills in the healthcare industry which includes intensive training in new high technology, complex healthcare software applications and best business practices. Trainees will have a better understanding of the Company's business operations. Given the need for intensive training, these trainees will need to complete 70 training hours to support the Company's new facilities in Hawaii and Seattle. With this increase in business, AMM anticipates additional growth of 30% over the next two years. The Company plans to expand services to Texas and Virginia.

Trainees must be hired within the three-month period prior to Panel approval or during the term of contract. Trainees will be hired into "net new jobs" as a condition of contract.

Medical Skills Training

Licensed Vocational Nurses and Registered Nurses will participate in Didactic training. Training will focus on advanced technical skills, use of new equipment and technology to improve performance and competency. The use of new equipment and technology will ensure that trainees have the skills, education and experience necessary to be the stewards of high quality, value-based care standards.

The Panel has established a "blended" reimbursement rate for this type of nurse upgrade training, recognizing the higher cost of delivery for the Didactic training model. The blended rate of \$22 per hour will apply to the Didactic modes of delivery. The standard class/lab rate, \$18 per hour for priority industries will apply to Business, Computer and Continuous Improvement Skills training.

4.1 Program Waivers

No waivers have been applied to this proposed project.

4.2 Subcontractor Summary

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

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

4.3 Previous ETP Project Summary

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

PROPOSED TRAINING PROJECT DETAILS

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
ET17-0216	Long Beach	09/15/16 – 09/14/18	\$48,360	\$46,854	97%

*ET17-0216 was closed effective 03-01-18.

4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 provide detailed training, curriculum and program characteristics.

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	Planned Course Offerings
Business Skills	Adjudication-Statistical Flags, Contesting a Claim
	Authorizations
	Case management
	Claims processing/Coding
	Communication/Coaching
	Credentialing
	Customer Service
	Division of Financial Responsibility
	Eligibility, Capitation Finance and Reporting
	Fraud Waste and Abuse
	GE (General Electric)/IDX (not an acronym) Flowcast
	Health Plan Options
	Independent Physician Associations (IPA)
	Leadership
	Logging/Processing
	Managed Care
	Marketing Strategies
	Medical Terminology and Reimbursement
	Medicare Advantage Hierarchical Condition Categories
	Member/Vendor/Code Specifics
	Patient Privacy
	Physician organizations and Government agencies
	Project Management
	Provider relations
	Quality Management
	Recovery (underpayment and overpayment)
	Referrals/Authorizations
	Risk Pools
	Sales/Marketing
	Shared Risk
	Star Measures
	Stop Loss
	Teambuilding
Time Management	
Trading Partners (Electronic Data Interchange)	
Computer Skills (Standard)	Accounts Receivable/Payable
	ADP Payroll System
	Automate Application (Software)
	Cerecons – Authorization Patient Services Portal

Attachment 2 - Training Delivery and Curriculum Listing

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

	CISCO Firewall
	Claim Shop
	Clinical Services Management Systems - PCDW
	Contracting Data Application
	Data Base Management System
	Electronic Claims (EDI) Member Portal
	Electronic Medical Records (EMR)
	Enterprise/MRP/Financial
	EZCAP- Patient / Provider Information System
	Fax Server Application (Software)
	FTP – File Transfer Protocol
	GFI (not an acronym) Mail Essentials
	Hardware configurations
	MS Office/Project (Intermediate and Advanced)
	Software troubleshooting
	Structured Query Language (SQL) Server
	Telephony Application (Software)
	Windows Security Patching
Continuous Improvement Skills	Leadership
	Problem Solving
	Quality Improvement
	Team Building
Medical Skills (didactic)	Behavior Management
	Caregiver
	Coordination of Care
	Dementia Care
	Diabetic Management
	Documentation
	Functional Mobility and Ambulation
	HCC Coding (Hierarchical Condition Categories)
	Home Health
	Hospice
	ICD-10 Coding (International Classification of Disease 10th Edition)
	Medical Skills Update
	Medication Administration and Management
	Neurological Conditions
	Orthopedic Conditions
	Pain Management (Acute and Chronic)
	Palliative Care
	Patient Assessment and Care
	Patient Fall Prevention

Attachment 2 - Training Delivery and Curriculum Listing

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

	Patient Transfer Techniques
	Wound Management



**TRAINING PROPOSAL FOR
Alta Newport Hospital, Inc.
18-0633**

Panel Meeting Date: 05/24/2018
Regional Office: San Diego Regional Office
Analyst Name: Cassandra Clady
Type of Proposal: Single Employer
Funding Source: SET

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$142,560.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$142,560.00	N/A	\$0.00	\$255,216.00

APPLICANT PROFILE

Company Summary	Alta Newport Hospital Inc. dba Foothill Regional Medical Center (Alta) provides inpatient diagnostic and therapeutic services, both surgical and non-surgical to patients in the eastern Orange County.
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Industry Sector(s)	Healthcare		
Priority Industry	Yes		
No. Employees (Applicant)	State: 2,900	US: 4,200	World Wide: 4,200
Turnover Rate (Applicant)	5.00 %		
Repeat Contractor	Yes		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Training will focus on new registered nurses and allied healthcare workers to effectively care for specialty care patient populations.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Job Creation – Retrainee Initiative Program, Retrainee	81	\$20.00	88	\$1,760	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 2014 and located in Tustin, Alta provides pediatric sub-acute respiratory care and educational and rehabilitative services to children with multiple, complex or profound disabilities. The Hospital is expanding its services and capabilities by 46 beds and 81 net new employees.

All training will take place in Tustin, CA

2. Current Training Project Details

Purpose of Training	<p>This will be Alta's second ETP Agreement, and the second in the past five years. Previous training focused on incumbent and newly hired Registered Nurses (RN's), as well as allied healthcare staff to work in specialized units. The Hospital was able to provide training in sub-acute critical care, Electronic Medical Records, advanced cardiovascular life support and basic life support. Training was also provided on various medical skills, new equipment and software systems.</p> <p>This proposal will exclusively focus on training 81 new employee healthcare workers. There is a shortage of skilled health care workers in California, especially Nursing, Clinical Lab Scientists and Therapy staff. ETP funding will help the Hospital provide the extensive training needed for staff to support the needs of the hospital's expansion. Expansion includes:</p> <ul style="list-style-type: none">• Twenty-two new general acute care beds.• Twenty Chemical Detoxification beds for Chemical Detox is a new service within.• Expansion of Surgical Services, including more complex Spinal and Orthopedic surgeries.• Expansion of Bariatric Surgical Service (Alta is currently applying to become a Designated Center of Excellence for Bariatric Surgery.) <p>Training will also focus on expanded and improved new nurse and allied health training programs that address the complexities of patient care services.</p>
Training Infrastructure and Administrative Plan	<p>The Chief of Nursing will oversee all administration and training. Alta has a detailed training plan in place and ready to begin training upon approval. Alta has also retained a subcontractor to assist with the administrative process.</p> <p>In-house experts will conduct all training.</p>

PROPOSED TRAINING PROJECT DETAILS

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

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations will receive Computer, Continuous Improvement and Medical Skills.	

Delivery Method/Level	Productive Laboratory
Summary	
All occupations will receive Medical Skills (Preceptor)	

4. Additional Company or Training Project Details

Medical Skills

This program provides funding for nurses and allied healthcare occupations with a Reimbursement Rate of:

- \$22 for clinical preceptor model
- \$22 for clinical didactic training

All nurses will receive one or more modules of MS Didactic training (classroom) in advance medical care. Didactic training will be provided in conjunction with Clinical Preceptor training to enhance the learning environment. Training will enhance learning and allow nurses to better understand clinical process, preparing them for work in the specialty area of Acute Care environment.

Retrainee – Job Creation

This program provides incentives to companies that commit to hiring new employees including a higher Reimbursement Rate:

- \$20.00 for all delivery methods (Class/Lab; Productive Lab)

Alta has committed to hiring 81 new employees: 40 Registered Nurses; 15 Licensed Vocational Nurses; 12 Respiratory Therapists; 6 Clinical Laboratory Scientists; 5 Radiology Technician; and 3 Physical Therapists supporting its existing Pediatric Sub-Acute Unit. These new employees will support the new Medical-Surgical, Bariatric Surgical Services, Intensive Care, Emergency, Chemical

PROPOSED TRAINING PROJECT DETAILS

Detox and other specialty units of the Hospital.

4.1 Program Waivers

Waivers	Description
Yes	Alta's standard work week for full time, benefited employees is 32 hours, as opposed to the ETP standard regulation of 35 hours. Therefore, the Hospital requests a waiver of 32 hours for these full time employees.

4.2 Subcontractor Summary

Alta has retained the services of the following Subcontractors.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	National Training Systems, Inc.	Ladera Ranch	\$5,793.63
Administrative	National Training Systems, Inc.	Ladera Ranch	10.00% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

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

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
ET15-0377	Tustin	2/2/15 - 2/1/17	\$307,966	\$135,508	44%

PROPOSED TRAINING PROJECT DETAILS

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
Notes	<p>Alta closed its Acute Care Unit for renovations and anticipated reopening it in October 2014. However, construction issues delayed the opening (all acute care staff was sent to work in other Alta hospitals in 2015.) The closure lasted nine months, so staff training for these workers did not take place. In addition, the California Department of Public Health Licensing Division determined that the Emergency Department needed to be brought up to 2015 construction standards. Because of the nature of the construction and regulatory approval process the Emergency Department was not able to open until January 2017. The delays impacted Alta's ability to hire and train new and incumbent staff, resulting in poor performance. However all hospital construction is complete, all necessary operating permits and licenses were obtained, and there will be no further construction, licensing or permit issues to impact training. The Contractor is requesting slightly more (142k) than previously earned (135k) because it has reopened the Acute Care Unit and can now proceed with ETP training. The increased funding will allow Alta to train staff in the expanded Acute Care Unit.</p>				

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Computer Skills (Standard)	Electronic Care Planning Order Entry
	Electronic Medical Records Application
	Microsoft Office/Excel (Intermediate and Advanced)
	Patient Billing Accounts Receivable (PBAR)
Continuous Improvement Skills	Case Management/Discharge Planning
	Charge Nurse Training/Frontline Leadership
	Communications Skills
	Conflict Resolution
	CORE Measures
	Crisis Prevention Intervention (CPI)
	Critical Thinking
	Culturally Appropriate Care
	Customer Service
	Documentation
	Lean Six Sigma
	Organization and Time Management
	Patient and Family Centered Care
	Performance Quality Improvement and Procedures
	Preceptor Skills (train-the-trainer)
	Team Building
Utilization Review	
Medical Skills (didactic)	Acute Myocardial Infarction
	Acute Psychiatric Care
	Advanced Cardiac Life Support (ACLS)
	Arterial Blood Gas (ABG) Interpretation
	Basic Life Support (BLS)
	Behavioral Health Nursing
	Body Mechanics
	Care of Bariatric Patient
	Care of Families & Siblings of Pediatric Sub-Acute
	Care of Pediatric Patients (Acute, Intensive Care)
	Care of the Burn Patient
	Care of the Cardiac Patient
	Care of the Neurosurgical Patient
	Care of the Stroke Patient
	Central Lines Management
	Chest Tube Care & Management
	Code Blue Response & Procedures
	Critical Care Nursing
Culture Considerations	

Attachment 2 - Training Delivery and Curriculum Listing

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

Dealing w/Difficult Personalities (Family&Patients)
Decontamination Procedures
Diabetes Care & Management
Dysrhythmia Recognition & Interpretation
Educating the Patient & Family
Effective Care Planning
Effective Documentation
EKG & Cardiac Monitoring
Electronic Fetal Monitoring (Beginning & Advanced)
Emergency Care of the Burn Patient
Emergency Room Nursing
Equipment Skills (IV pump, cardiac telemetry, etc)
Evidence Based Practices
Gastrointestinal Assessment and Management
Hemodynamic Monitoring
Identification and Prevention of Aspiration
Identification and prevention of UTIs
Identification and Treatment of Sepsis
Infection Control
Intra-Aortic Balloon Pump Therapy (IABP)
Intra-Cranial Pressure Monitoring & Ventriculostomy
Intravenous (IV) Insertion & Therapy
Kinetic Therapy
Labor, Delivery and Postpartum Nursing
Management Renal Transplant Surgical Patient
Medical/Surgical Nursing
Medication Administration & Management
Moderate Sedation
Neonatal Advanced Life Support (NALS)
Neonatal Intensive Care Unit (NICU) Nursing
Neonatal Nursing
Neonatal Resuscitation Provider (NRP)
Neonatal/Infant Pain Scale (NIPS)
New Certified Nurse Assistant
New Graduate Nursing
Nurse Orientation Training (for New Grads only)
Nursing Diagnosis
Nursing Process
OB Trauma
Oncology Nursing
Orthopedic Nursing
Ostomy & Continance Care

Attachment 2 - Training Delivery and Curriculum Listing

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

Pain Management (Acute & Chronic)
Patient Assessment & Care
Patient Fall Prevention
Pediatric Advanced Life Support (PALS)
Pediatric IV/IO Care
Pediatric Pharmacology
Peri-Operative Nursing
PICC Line Insertion
Pre and Post-Operative Care
Psychiatric Nursing
Psychotropic Medications
Rapid Response
Renal Assessment & Management
Respiratory Assessment & Care
Responding Pediatric Emergencies in Sub-Acute
Restraints
S.T.A.B.L.E.
Surgical Nursing
Telemetry Nursing
Total Parenteral Nutrition (TPN)
Transfer Techniques
Trauma Nursing
Triage Nursing
Ventilator and Tracheotomy Care
Versant New Graduate Program
Wound & Skin Care

<i>Delivery Method /Level</i>	<i>Productive Laboratory</i>
Training Type (Level)	Planned Course Offerings
Medical Skills (preceptor)	Acute Psychiatric Care
	Advanced & Electronic Fetal Monitoring
	Antepartum, Labor, Delivery and Postpartum
	Behavioral Health Nursing
	Care of the Neurosurgical Patient
	Care of Pediatric patients
	Care of Pediatric Patients (Acute Intensive Care)
	Care of Pediatric/Adolescent Psychiatry Patient
	Care of the Burn Patient
	Care of the Cardiac Patient
	Care of Trauma Patient
	Critical Care Nursing
	Detox
	Dysrhythmia Interpretation

Attachment 2 - Training Delivery and Curriculum Listing

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

EKG & Cardiac Monitoring
Electroconvulsive Therapy (ECT)
Emergency Care of the Burn Patient
Emergency Room Nursing
Geriatric Nursing
Hemodynamic Monitoring
Hospice Nursing
Integration of the Care Plan
Intra-Aortic Balloon Pump (IABP) Therapy
Intracranial Pressure Monitoring & Ventriculostomy
Intravenous (IV) Therapy
IV/IO Skills
Management Renal Transplant Surgical Patient
Med/Surg Nursing
Medical/Surgical Nursing
Medication Administration
Neonatal Advanced Life Support
Neonatal Intensive Care Unit (NICU) Nursing
Neonatal Nursing
Neonatal Resuscitation Provider (NRP)
Neonatal/Infant Pain Scale (NIPS)
OB Trauma
Oncology Nursing
Orthopedic Nursing
Pain Management
Palliative Care
Patient Assessment & Care
Patient Assessment and Care
Peri-Operative Nursing
Post-Neurological Injury Nursing
Post-Orthopedic Surgery Nursing
Post-Trauma Injury Nursing
Pre & Post-Operative Care
Pre and Post-Operative Care
Response to Emergency Situations/Code Blue
S.T.A.B.L.E.
Surgical Nursing
Telemetry Nursing
Total Parenteral Nutrition
Trauma Nursing
Triage Nursing
Ventilator & Tracheotomy Care
Ventilator and Tracheostomy Care
Wound Assessment & Care

Attachment 2 - Training Delivery and Curriculum Listing

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

PL Justification and Details		
Explain the need for productive laboratory (PL) training	There is actually no productive laboratory training in this application; rather it is Preceptor-led Clinical training where an experienced nurse for example, teaches and mentors a newly hired nurse.	
Describe the Equipment/Processes to be used in delivering the PL training	Trainees will receive instruction on proper usage and safe operation of various hospital equipment used to provide patient care.	
Describe Trainer Qualifications	Preceptors are skilled and competent who must be able to demonstrate clinical expertise to be a role model for safe, quality patient care. An effective preceptor contributes to the trainees competency development, a decrease in medication errors, job satisfaction and increased retention rate.	
Trainer to Trainee Ratios - If more than one PL class the ratios are the lowest and the highest trainer-to-trainee ratio	Trainer	Trainee
Ratio for One Class, or Minimum When More than One Class	1	1
Ratio for Maximum Ratio When More than One Class	1	5
PLT Approval	Yes	



**TRAINING PROPOSAL FOR
AMRO FABRICATING CORPORATION
17-0968**

Panel Meeting Date: 05/24/2018
Regional Office: North Hollywood Regional Office
Analyst Name: Marisol Niquet
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 96,640.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 96,640.00	N/A	\$ 0.00	\$ 200,000.00

APPLICANT PROFILE

Company Summary	Amro Fabricating Corporation. (AMRO) specializes in building metallic structures for spacecraft and launch vehicles.		
Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 170	US: 170	World Wide: 170
Turnover Rate (Applicant)	11.00 %		
Repeat Contractor	No		
High Unemployment Area	Yes		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Training will assist the Company in meeting industry requirements and improving efficiencies. Training will ensure that staff has the knowledge to be most effective in their roles.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Job Creation – Retrainee Initiative Program, Retrainee	20	\$ 20.00	40	\$ 800	8 - 200
2	Retrainee	160	\$ 18.00	28	\$ 504	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 1977 and headquartered in South El Monte, Amro Fabricating Corp. (AMRO) is a manufacturer that specializes in building metallic structures for spacecraft and launch vehicles that serve NASA, including the former Space Shuttle program and the new exploration system, the Space Launch System (SLS) rocket and deep space crew vehicle, Orion. AMRO has the U.S. Department of Defense and other commercial aerospace customers. AMRO also manufactures large assembly tooling for commercial aircraft, missiles, launch vehicles, and spacecraft. With facilities in El Monte and Moreno Valley, AMRO is a key contributor to the state's historic aerospace industrial base serving the American space program, national security and commercial aerospace providers.

Since AMRO's initial work building Isogrid panels for Titan IV payload fairings in the 1980s, the Company has developed a proprietary and robust forming process that allows fully optimized designs to be produced with the least amount of mass. Today, AMRO offers flight-heritage Isogrid and Orthogrid metallic structures used for spacecraft and launch vehicle primary structures as well as high-speed machining, precision brake forming, certified welding, laser tracking, heat aging, integration, assembly, test and nationwide installation. AMRO is committed to the development of its local workforce and the Aerospace and Defense industries.

2. Current Training Project Details

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

Purpose of Training

AMRO is keeping pace with many changes that are currently impacting the aerospace industry. With increased competition from out of state competitors and the high growth of new entrants into the market, the Company is pushing forward to meet new challenges. The business climate in California makes it increasingly difficult to compete with out of state competitors. Customers are requesting more complex parts and more challenging engineering, with tighter process controls. Therefore, there is a greater push to train and evolve staff skills and capabilities.

Business Skills will be offered to all occupations. Training will enable trainees to keep up to date with customer needs, accounting, marketing, product knowledge and programs and skills needed company wide. Training topics include cost estimating, accounting and handling time cards.

Continuous improvement skills will be offered to all occupations. Training will keep employees up to date with the AS9100 Rev. D requirements, process improvement and quality procedure changes. Training topics include F.O.D Training, Quality

PROPOSED TRAINING PROJECT DETAILS

	<p>assurance, AS 9100 Compliance, and Quality Control.</p> <p>Hazardous material training will be offered to supervisors and production staff. This training will develop environmental protection awareness, forklift safety, as well as proper lifting and handling techniques, hazardous materials handling and general safety.</p> <p>Management skills will be offered to our supervisors. Training will develop and improve skills of managers and supervisors in leadership, decision making, team building and training procedures. Management skills will consist of strategic planning, new supervisor training, team building, labor hour reporting, and injury reporting.</p> <p>Manufacturing Skills will be offered to production staff and supervisors. Manufacturing skills will include courses such as forming, machining, welding, deburring, mechanical inspection, laser inspection</p> <p>Training will take place at the Company's multiple locations in South El Monte and Moreno Valley. Training will be delivered by a combination of in-house subject matter experts and vendors to be identified during the term of the contract.</p>
Training Infrastructure and Administrative Plan	<p>AMRO spends an estimated \$200,000 annually in training at their California facilities. The Company currently provides on-the-job training related to specific job functions. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.</p> <p>The Company has identified two General Managers and an Office Manager at each training location who will ensure that training, administration and documentation adhere to ETP requirements and an internal training administrator who will reconcile all documentation weekly. The Company has a detailed training plan in place and are ready to begin training upon approval.</p>
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

PROPOSED TRAINING PROJECT DETAILS

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations will receive training in Business Skills, and Continuous Improvement (Attachment 2).	
Production staff and Supervisors will receive training in Hazardous Material Skills, and Manufacturing Skills (Attachment 2).	
Supervisors will receive Management Skills training (Attachment 2).	

4. Additional Company or Training Project Details

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

Retrainee - Job Creation

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

AMRO has recently purchased two large high-speed milling machines and is installing two additional machines in September 2018. These machines represent manufacturing capability at the highest precision level, utilizing the latest technology and software, support and training. In addition, employees will be able to create large and more complex parts for customers. The new equipment will assist AMRO's expansion plan by continuing to raise the level of competencies of employees throughout the Company.

As a result, AMRO is committed to hiring 20 new Production Staff (Job Number 1). The date-of-hire for all trainees will be within the three-month period before contract approval or within the term-of-contract. Trainees will be hired into "net new jobs" as a condition of contract.

4.1 Program Waivers

No waivers have been applied to this proposed project.

4.2 Subcontractor Summary

N/A

4.3 Previous ETP Project Summary

N/A

PROPOSED TRAINING PROJECT DETAILS

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Accounting
	Basic Computer Skills -Microsoft Office/Equipment
	Cost Estimating
	ERP System / Macola ES
	Microsoft Project
	Work Orders
Continuous Improvement Skills	AS9100 Rev. D Compliance
	F.O.D Training
	Quality Assurance
	Quality Control
Hazardous Materials Skills	Forklift Training
	Hazmat Handling
	Lift and Handling Techniques
	Protective Equipment
	Safe Disposal of Hazmat Material
Management Skills	Injury Reporting
	Labor Reporting
	New Supervisor Training
	Strategic Planning
	Team Building
Manufacturing Skills (ME) (Standard)	Basic Blueprint Reading
	Benching and Deburring
	Calibration
	Catia
	Fabrication - Forming Techniques
	GD&T
	Laser Inspection Techniques
	Machine Shop General Concepts
	Mastercam
	Packaging and General Handling
	Quality Inspection Techniques
	Traveler Comprehension
	Verisurf
	Weld General Concepts



RETRAINEE - JOB CREATION

Training Proposal for:

Associated Construction and Engineering, Inc.

Agreement Number: ET18-0226

Panel Meeting of: May 24, 2018

ETP Regional Office: San Diego

Analyst: K. Hernandez

PROJECT PROFILE

Contract Attributes:	Job Creation Initiative Priority Rate Retrainee	Industry Sector(s):	Construction Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Orange, San Luis Obispo Riverside	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Laborers' International Union of North America Local 1184		
Number of Employees in:	CA: 229	U.S.: 276	Worldwide: 276
<u>Turnover Rate:</u>	18%		
<u>Managers/Supervisors:</u> (% of total trainees)	4%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	=	(High Earner Reduction)	=	Total ETP Funding
\$193,840		\$0		\$0		\$193,840

In-Kind Contribution:	100% of Total ETP Funding Required	\$270,810
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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, HazMat, OSHA 10/30, PL-Comm'l. Skills	153	8-200	0	\$1,080	\$16.70
				Weighted Avg: 60			
2	Retrainee Priority Rate Job Creation	Business Skills, Comm'l. Skills, Computer Skills, HazMat, OSHA 10/30, PL-Comm'l. Skills	22	8-200	0	\$1,300	*\$13.66
				Weighted Avg: 65			

*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: \$17.50 per hour in Orange County; \$16.70 per hour in San Luis Obispo and Riverside counties
 Job Number 2 (Job Creation): \$14.58 per hour in Orange County; \$13.66 per hour in San Luis Obispo and Riverside 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 \$2.35 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		
Administrative Staff		16
Accounting Staff		15
Project Coordinators		3
Project Managers		14
Shop Laborers		15
Shop Welders		18
Shop Mechanics		5
Field Boilermakers		23
Field Laborers II		14
Field Laborers I		5

Field Carpenters		11
Drafters		8
Engineers		3
Estimators		3
Job Number 2 – Job Creation		
Administrative Staff		2
Project Coordinators		1
Shop Laborers		5
Shop Welders		2
Field Boilermakers		2
Field Laborers II		2
Field Laborers I		2
Field Carpenters		3
Drafters		2
Estimators		1

INTRODUCTION

Founded in 2011, Associated Construction and Engineering, Inc. (ACE) provides turn-key service on all welded, bolted, concrete and stainless-steel tank structures to water storage (potable and waste), thermal energy storage, oil & gas storage, and wine storage. The Company offers a full portfolio of services via its wholly-owned subsidiaries. The key to ACE's success is its diverse subsidiaries: Paso Robles Tank - Brown-Minneapolis Tank, Inc.; Canyon Springs Enterprises, Inc. dba RSH Construction Services; Associated Tank Constructors; and West Coast Industrial Coatings, Inc.

The ACE affiliated companies have been successful because they address all of the phases associated with quality tank building. The continuity in process across all companies has been key to their success as a company. ACE has also been able to create synergies across companies promoting efficiency and value to benefit their clients. The company believes this cross pollination is a vital part of their growth plan over the next eighteen months. For these reasons, ACE is requesting for all of ACE company subsidiaries in California to be included in the project and will train staff from both the parent company and its affiliates.

ACE's principle customers are municipal water districts, private developers in the water & waste water management sector, oil & gas industry suppliers, and agribusiness companies. These customers rely on ACE to provide a quality welded or bolted carbon steel product for potable water, waste water, and petroleum storage and delivery. In addition, its agribusiness customers trust ACE to provide stainless steel containers for wine manufacturing and storage.

PROJECT DETAILS

ACE is continuously faced with competition from out-of-state corporations and must train its staff to become a highly skilled and productive workforce.

To respond to competitive pressure, ACE must develop new product lines and improve product line efficiency. Thus, ACE has invested \$3.4 million in new equipment and technology to aide in its new Bolted Tanks Division. This significant investment has created a need to train their operational staff (Shop Laborers, Shop Welders, Shop Mechanics, Field Boilermakers, Field Laborers, and Field Carpenters) how to operate the new equipment, manage the new technology and install the finished products in the field.

In addition, there is a company-wide initiative to focus on process improvement and operational excellence. As part of this initiative, ACE has invested in Foundation For Construction software (Accounting, Project Management, Inventory Control and Document Control programs) to streamline the engineering/design process, build/construct process and improve the scheduling and tracking of projects. This training will be delivered to all operational support staff (Accounting Staff, Project Coordinators, Project Managers, Drafters, Engineer, and Estimators) involved in welded tank structures.

ACE must upgrade worker skills, increase efficiency and streamline processes from project design through close out to remain competitive.

Retrainee - Job Creation

ACE has invested significant resources in a new Bolted Tank Line. As a result, the Company projects to hire 22 new workers in a manufacturing/operational capacity (Shop Laborers, Shop Welders and Shop Mechanics) at the Hemet facility as well as Field Boilermakers, Field Laborers and Field Carpenters to install the product in the field. These are highly skilled positions that require significant training upon being hired. In addition, ACE recently hired a new Estimator to increase its current capacity to bid for work in California. As a result the Company must hire additional operational support staff (Accounting Staff, Project Coordinators, Project Managers, Drafters, Engineers and Estimators) to complete new projects.

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.

ACE has committed to hiring 22 new employees (Job Number 2.) The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

Union Support

A letter of support has been provided by the Laborers' International Union of North America Local 1184 for those Field Laborers included in the training plan covered by a collective bargaining agreement. No other trainees are covered by a CBA.

Training Plan

Training will be delivered via class/lab and Productive Lab (PL) in the following:

Business Skills: Training will be provided to Project Coordinators, Project Managers, Administrative and Accounting Staff. Training will focus on process improvement initiatives, change and risk management execution and business writing tasks used to communicate with customers.

Commercial Skills: Training will be provided to all occupations in the critical skills needed to operate heavy machinery, power tools, and execute other job specific tasks.

Computer Skills: Training will be provided to Project Coordinators, Project Managers, Administrative and Accounting Staff to effectively utilize Foundations For Construction software and the Microsoft Office suite of programs.

Certified Safety Training

1. OSHA 10/30. This training is a series of courses “bundled” by industry sector and occupation. It consists of 10 hours of classroom or CBT training for journey-level workers and 30 hours for frontline supervisors. The coursework is geared to construction work and manufacturing. Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.
2. Hazardous 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, Shop Laborers, Shop Welders, Shop Mechanics, Field Boilermakers, Field Laborers, and Field Carpenters will receive up to 24 hours of training. Field training may be required, although not funded by ETP. Completion of the training results in a certificate that expands employment opportunities. This coursework is not under Cal-OSHA, but is administered under the Department of Transportation and CalTRANS. There are various certification entities for the coursework and instructors. In this proposal, the certification entity has not yet been determined.

Productive Laboratory

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

PL training is required for operational staff (Shop Laborers, Shop Welders, Shop Mechanics, Field Boilermakers, Field Laborers and Field Carpenters) to assure comprehensive training in hazardous activities and assure competency in the following training topics: Mobile Crane Operation, Overhead Crane Operation, Rigging, Confined Space Entry, Fall Protection/Fall Prevention, Scaffold Use, Aerial Lift Operation, Hydrogen Sulfide Monitoring, Hand and Power Tool Use, Ladder Safety, Welding, Cutting and Hot Work, Hexavalent Chromium, Lead Work, Abrasive Blasting and Painting.

Most training is performed using a trainer to trainee ratio of 1:1. New employee training is typically performed 1:1. However, small groups (up to 1:3 ratio) are utilized for training sessions where third party training or testing is required. The smaller groups allow trainees to interact and introduce scenarios/experience in a group setting that adds valuable content. Additionally, third party training/testing availability is often limited. Therefore, it is necessary to increase the training ratio based on the availability of the training services.

Training differs from work assignments as training is necessary prior to placing an employee into a hazardous work environment where it is not feasible to use engineering controls to eliminate the hazards. In addition, PL training will occur when trainees are working directly under a trainer on a designated work assignment. Trainers will have working knowledge of the training topic and be able to answer questions while also presenting information related to the training topic in a clear and concise manner.

Retention Modifications

The construction industry is effected by seasonality. Some employees may not work 35 hours per week for 90 consecutive days. For occupations in which workers are hired for short-term jobs (Shop Laborers, Shop Welders, Shop Mechanics, Field Boilermakers, Field Laborers and Field Carpenters), retention may be satisfied by employment of at least 500 hours within 180 days. As such, the Contractor requests this alternative retention modification.

Commitment to Training

ACE estimates it currently spends \$130,945 per year at each of the three California locations. Training differs across all positions and trades at the company. ACE tailors its current training to focus on safety in the workplace and core job competencies.

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

Training Infrastructure

Training will be delivered by six executive management employees that are experts in their field, and vendors as needed. These individuals design the training curriculum for ACE and identify areas of needed improvement through quality assurance and quality control. If ACE does not have a subject matter expert in-house to deliver training on a specific topic they will hire a training vendor to conduct training. ACE will perform all project administration. The Controller and Administrative Assistant will coordinate all training efforts; including scheduling training, managing trainee enrollment, verifying training topics, collecting attendance rosters, monitoring trainee retention completion, and ensuring compliance with all ETP requirements. Each location has an Administrative Assistant to help document and coordinate the training provided at each location.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- Business Writing
- Accounting Basics
- Best Practices
- Process Improvement
- Communications
- Problem Solving
- Change Management
- Risk Management
- Effective Job Costing
- Project Management

COMMERCIAL SKILLS

- Estimating
- Project Management
- Completed Job Analysis
- Quality Control
- Fork Lift Certification
- Document Imaging and Routing Procedures
- Timekeeping System Use and Reporting
- Job Site Safety and Regulations
- Mobile Crane Operation
- Overhead Crane Operation
- Aerial Lift Operation
- Abrasive Blasting and Painting
- Welding Process and Certification

COMPUTER SKILLS

- Microsoft Office (Intermediate/Advanced)
- AutoCad and Inventor 4D Modeling
- Foundations For Construction Software (Accounting, Inventory, Project Management, Purchasing, Document Control)

HAZARDOUS MATERIALS

- Hydrogen Sulfide Handling
- Hexavalent Chromium Handling

OSHA 10/30 (Certified OSHA Instructor)

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

PL Hours

0 – 60

COMMERCIAL SKILLS (Ratio 1:3)

- Mobile Crane Operation
- Overhead Crane Operation
- Rigging
- Confined Space Entry
- Fall Protection/Fall Prevention
- Scaffold Use
- Aerial Lift Operation
- Hydrogen Sulfide Monitoring
- Hand and Power Tool Use
- Ladder Safety
- Welding, Cutting and Hot Work
- Hexavalent Chromium
- Lead Work
- Abrasive Blasting and Painting

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

Laborers'
International
Union of
North America

LiUNA!

Local No. 1184

March 21, 2018

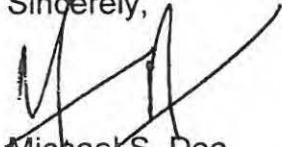
VIA E-MAIL: bhamilton@Rshconstruction.com

RSH Canyon Springs Enterprise, Inc.
dba RSH Construction Services
Attn: Bob Hamilton
3883 Wentworth Dr. Bldg. B.
Hemet, CA 92545

RE: Union Letter of Support, Employment Training (ETP Program)

Laborers Local 1184 is supportive of RSH Canyon Springs Enterprise, Inc. dba RSH Construction Services applying for the program. We understand that the California Employment Training Panel (ETP) is a business and labor supported state agency that assists companies in upgrading the skills of their workforce enabling them to remain competitive. The training received under this program will assist RSH Canyon Springs Enterprise, Inc. dba RSH Construction Services to upgrade the skills of their workforce.

Sincerely,



Michael S. Dea
Business Manager
Secretary-Treasurer

MSD: cmu

Local No. 1184
Riverside
and
Imperial
Counties

MICHAEL S. DEA
BUSINESS MANAGER

William G. Smith
PRESIDENT

MAIN OFFICE

1128 E. La Cadena Drive
Riverside, CA 92507
Telephone: 951-684-1484
Fax: 951-779-1445

THOUSAND PALMS OFFICE

P. O. BOX 155
THOUSAND PALMS, CA 92276
(760) 343-0533
FAX (760) 343-0883
(800) 203-3111

BRAWLEY OFFICE

1644 JONES ST.
BRAWLEY, CA 92227
(760) 351-8923
FAX (760) 351-8947

Feel the Power



RETRAINEE - JOB CREATION

Training Proposal for:

Bonney Plumbing, LLC

Agreement Number: ET18-0207

Panel Meeting of: May 24, 2018

ETP Regional Office: Sacramento

Analyst: D. Jordan

PROJECT PROFILE

Contract Attributes:	Retrainee Job Creation Initiative SET Priority Rate Veterans	Industry Sector(s):	Construction Services Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Sacramento	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 160	U.S.: 160	Worldwide: 160
<u>Turnover Rate:</u>	18%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$249,960		\$0	\$0		\$249,960

In-Kind Contribution:	100% of Total ETP Funding Required	\$598,000
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement Skills, Hazardous Materials, OSHA 10/30, PL-Commercial Skills	130	8 - 200	0	\$1,242	\$22.77
				Weighted Avg: 69			
2	Retrainee Job Creation Initiative SET Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement Skills, Hazardous Materials, OSHA 10/30, PL-Commercial Skills	40	8 - 200	0	\$1,800	*\$14.00
				Weighted Avg: 90			
3	Retrainee Veterans SET Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement Skills, Hazardous Materials, OSHA 10/30, PL-Commercial Skills	10	8 - 200	0	\$1,650	\$22.77
				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: SET/Priority: Job Numbers 1 & 3: \$22.77 per hour in Sacramento County; Job Number 2: \$14.00 per hour in Sacramento County.

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

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

Job Numbers 1 & 3: up to \$ 2.42 per hour may be used to meet the Post-Retention Wage.

Job Number 2: up to \$ 2.00 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		
Technical Installers		33
Sales Staff		25
Frontline Supervisors		15
Technicians		57
Job Number 2		
Technical Installers		12
Sales Staff		2
Frontline Supervisors		1
Technicians		25
Job Number 3		
Technical Installers		2
Technicians		8

INTRODUCTION

Founded in 1978 and headquartered in Rancho Cordova, Bonney Plumbing, LLC. (Bonney Plumbing) (www.bonney.com) provides heating, ventilation, air conditioning, electrical, plumbing installation, and repair diagnostic services to residential homeowners and tenants. Bonney Plumbing operates within the residential construction segment and does not compete with commercial HVAC, electrical entities. Training will take place at Bonney Plumbing's two locations in Rancho Cordova. This is Bonney Plumbing's first ETP Agreement.

Need For Training

California Title 24 has mandated energy efficiency levels be more efficient than 2008 standards. There is substantial emphasis put on creating more energy efficient systems, including new technologies and components within heating and air-cooling systems, ventilation, and duct work. Trainees must be properly trained to diagnose, install and repair these systems, along with the requisite tooling and materials ancillary to their job.

Bonney Plumbing trains staff in well-rounded skill sets that include new technology, methodology, and soft skills. ETP-funded Training will focus on continual updated and mandated requirements for CA Title 24 and changes that have taken place within the Company.

Training will also focus on equipment and code changes including mini-splits, inverter systems/compressors, plumbing fixtures and circuits. Trainees will also receive training on sales procedures, presentation and negotiation skills. Due to changes in technology, staff must have a higher level of customer interaction and transaction process skills.

Veterans Program

The Panel provides a higher reimbursement rate and other incentives for training California veterans. Bonney Plumbing plans to train 10 Veterans (Job Number 3). Veteran training will be reimbursed at \$22 per hour.

The Company is not requesting a modified retention period for Veterans.

Retrainee - Job Creation

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

Bonney Plumbing has committed to hiring 40 new employees (Job Number 2). Hiring these trainees will assist to maintain superior customer service. The addition of these trainees will enable the Company to sustain consistency with scheduling of appointments during their peak season. Bonney Plumbing will be expanding its facilities, acquiring a 30,000 sq. ft. building to accommodate additional trainees and more service vehicles.

Temporary to Permanent Hiring

Bonney Plumbing will train 15 Technicians (Job Number 2) under Panel guidelines for the Temporary-to-Permanent program. The Company has retained these employees on a temporary basis, with the intention of hiring them into full-time, permanent positions after training. The average time for “converting” temporary workers into full-time permanent employment is 3 months. These workers will receive employer-paid share-of-cost for healthcare premiums while on temporary status, and upon hire into full-time permanent employment.

Trainees must be eligible to participate in ETP-funded training. Moreover, they cannot be enrolled as trainees until they are hired by Bonney Plumbing into full-time, permanent employment. Until hired, retention and post-retention wage requirements cannot be satisfied, and the Company will not receive progress payments.

PROJECT DETAILS

Training Plan

Class/Lab training will be provided by in-house subject matter experts in the following:

Business Skills: Training will be delivered to Sales and Technical Installer Staff. Training will include Sales, Presentation and Negotiation skills. Training will also include changes in requirements of Title 24.

Hazardous Materials Skills: Training will be delivered to Technicians, Technical Installers and Sales Staff. Training will focus on the understanding of materials and disposal methods. This training is highly technical and meets all industry and OSHA governmental standards.

Commercial Skills: Training will be delivered to Technicians, Technical Installers and Sales staff. Training will focus on technology, methodology regarding the changes pursuant to Title 24 along with technical, equipment and code changes. Training topics include Digital Tools, Heat Pump Systems, Plumbing Codes and Residential Electrical Systems.

Computer Skills: Training will be delivered to all occupations. Training will focus on new mobile tablets that will be used in the field. Trainees will also receive training on Intermediate Microsoft Office and new Service Titan software application.

Continuous Improvement: Training will be delivered to all occupations. Training will focus on improving the overall efficiency of the business. Training topics include Quality Control, Team Building, and Streamlining Logistics.

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

Productive Laboratory (PL)

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

Training will be delivered to Technicians and Technical Installers. When paired with classroom training, PL is the best training technique for trainees. Trainees will work with a trainer who will explain and demonstrate step-by-step instructions and then observe while trainees perform these same tasks. Training will consist of courses in Heat Pump Systems, Metering Devices, System Controls/Smart System Controllers, and Wiring. Production will be affected because an experienced technician will be used to train and observe trainees. Bonney Plumbing will provide up to 60 hours for PL-Commercial skills training at a 1:2 trainer-to-trainee ratio. Installation of heat pumps and air conditioning units will require 2 technicians to perform the task.

Commitment to Training

Bonney Plumbing allocates approximately \$666,500 annually for training that includes new-hire orientation, staff development and safety training. ETP funds will not displace the existing financial commitment to training. Safety training is provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

Bonney Plumbing has a detailed training plan in place and is ready to begin training upon approval. The Company’s HR Manager and two administrative staff members will oversee this training project. In addition, the Company has retained the services of Synergy Management Consultants, LLC to assist with administration. Training will be delivered by in-house experts, and vendors to be determined later.

Green/Clean Operations

Bonney Plumbing works with, and installs, new green/clean technology HVAC systems within residential spaces.

Nanotechnology

Bonney plumbing uses nanotechnology to eliminate the use of common refrigerants such as CFC/HCFC. The technology harnesses nano particles and doesn’t use cooling agents like fluorocarbons.

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.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Bonney Plumbing retained Synergy Management Consultants, LLC in Grass Valley to assist with development of this proposal for a flat fee of \$32,500.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined.

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- Coaching
- Communication
- Conflict Management
- Customer Needs Assessment and Relationship Training
- Development Plans
- Finance For Leaders – Budgeting, Forecasting and Planning
- Leading Teams
- Marketing
- Motivation
- Negotiation Skills
- Presentation Skills
- Sales Skills

COMMERCIAL SKILLS

- Air Conditioning Systems
- Air Quality Diagnostics and Methodologies
- Back Flow Systems
- Barriers Methodologies
- Basic Tools
- Compression Fittings
- Diagnostics
- Digital Tools
- Digital Tools Gauges
- Disposals
- Drains- Roof/ Floor and Area
- Electrical Components and Devices
- Electrical Fundamentals
- Electrical Safety and Tools
- Field Tools/ Gauges
- Fixtures and Faucets Including Install
- Gas and Fuel Systems
- Heat Pump Systems
- High Voltage/ Low Voltage Systems
- Insulating Methodologies
- Inverter Technology
- Inverter Type Motors
- Lighting
- Main Line Repairs/ Replacements
- Maintenance Procedures
- Metering Devices
- Motors
- On Demand Hot Water Systems
- Pipes and Fittings Including Install
- Pipes and Supply Lines
- Plumbing Code

- Plumbing Safety
- Reading Electrical Drawings, Fixture Schematics
- Residential Electrical Systems
- Schematics and Plans
- Septic Systems
- Sewage and Pump Systems
- Specialized Tools
- Switches and Electrical Components
- System Controls/Smart System Controllers
- Thermal Dynamics
- Thermostats
- Trenching/ Trenchless Applications
- Trouble Shooting Electrical Systems/ Components
- Valves
- Ventilation Systems
- Venting
- Video Inspection
- Water Heaters
- Water Pressure Booster and Recirc Systems
- Water Supply Treatment Systems
- Wiring
- Wiring- Conduits, Cables and Connectors

COMPUTER SKILLS

- Intermediate MS Office
- Regulatory Code Research Techniques
- Service Titan (Proprietary HVAC Management Software) Skills
- Tablet Billing and Applications

CONTINUOUS IMPROVEMENT

- Quality Control/Systems
- Solving Problems
- Streamlining Logistics
- Standard Operating Process
- Team Building

HAZARDOUS MATERIALS

- Asbestos Handling
- Coolant Systems- Evac and Weigh in Procedures
- HAZ Mat Safety

OSHA (WITH OSHA CERTIFIED INSTRUCTOR)

- OSHA 10 (Requires 10 hours completion)
- OSHA 30 (Requires 30 hours completion)

Safety Training is capped at 10% of a trainee's total training hours.
This cap does not apply to OSHA 10/30.

PL Hours

0 – 60

COMMERCIAL SKILLS (PL) (limited ratio 1:2)

- Air Conditioning Systems
- Air Quality Diagnostics and Methodologies
- Back Flow Systems
- Barriers Methodologies
- Cast Iron Pipe and Fittings
- Copper Pipe and Fittings
- Corrugated Stainless Steel Tubing
- Diagnosing Electrical Issues
- Diagnostics
- Digital Tools
- Disposals
- Drains- Roof/ Floor and Area
- Fixtures and Faucets including install
- Gas and Fuel Systems
- Heat Pump Systems
- Installing Low or High Voltage Fixtures
- Inverter type Systems
- Locating Buried Water and Sewer Lines
- Metering Devices
- Motors
- On Demand Hot Water Systems
- Pipes and Fittings (plastic) Including Install
- Pipes and Supply Lines
- Schematics/ Plans
- Septic Systems
- Sewage and Pump Systems
- Switches and Electrical Components
- System Controls/Smart System Controllers
- Thermal Dynamics
- Thermostats
- Trenchless Replacements
- Valves
- Ventilation Systems
- Venting
- Video Inspection
- Water Heaters
- Water Pressure Booster and Recirc Systems
- Water Supply Treatment Systems
- Wiring
- Wiring Conduits and Connectors

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



Training Proposal for:

Build.com, Inc.

Agreement Number: ET18-0230

Panel Meeting of: May 24, 2018

ETP Regional Office: Sacramento

Analyst: C. Kaiser

PROJECT PROFILE

Contract Attributes:	Job Creation Initiative Retrainee Veterans	Industry Sector(s):	Retail Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Counties Served:	Butte	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: 680	U.S.:24,000	Worldwide: 39,000
<u>Turnover Rate:</u>	17%		
<u>Managers/Supervisors:</u> (% of total trainees)	5%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$76,600		\$0	\$0		\$76,600

In-Kind Contribution:	100% of Total ETP Funding Required	\$114,267
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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, Continuous Impr, Management Skills	59	8-200	0-40	\$600	\$16.70
				Weighted Avg: 40			
2	Retrainee Job Creation	Business Skills, Computer Skills, Continuous Impr, Management Skills	35	8-200	0-40	\$800	\$13.66*
				Weighted Avg: 40			
3	Retrainee Veterans	Business Skills, Computer Skills, Continuous Impr, Management Skills	15	8-200	0-40	\$880	\$16.70
				Weighted Avg: 40			

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

Minimum Wage by County: Job Numbers 1 & 3: \$16.70 per hour for Butte County; Job Number 2: \$13.66 per hour for Butte 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 \$1.70 per hour may be used to meet the Post-Retention Wage for Job Numbers 1 & 3.

Wage Range by Occupation

Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1 (Retrainee)		
Analytics		1
Brand Manager		2
Category Merchant		1
Customer Experience		30
Data Staff		5
Designer Staff		1
Email Marketing Specialist		1
Finance Staff		1
Human Resources Staff		5
Managers/Supervisors		3
Marketplace Specialist		5
Paid Search Specialist		2

Pay Per Click Marketing Staff		1
Software Developers		2
Vendor Account Manager		1
Vendor Returns Coordinator		1
Job Number 2 (Job Creation)		
Brand Manager		1
Category Merchant		1
Customer Experience		15
Data Staff		4
Managers/Supervisors		2
Marketplace Specialist		2
Paid Search Specialist		3
Pay Per Click Marketing Staff		1
Software Developers		1
Vendor Account Manager		2
Job Number 3 (Veterans)		
Brand Manager		3
Data Staff		7
IT Staff		1
Logistics Specialist		1
Pay Per Click Marketing Staff		1
Vendor Account Manager		2

INTRODUCTION

Founded in 2000 and headquartered in Chico, Build.com, Inc. (Build) (www.build.com) is an e-commerce company for home improvement products. The Company sells worldwide to individuals and companies such as homeowners, interior designers, and contractors. The Company started with 3 employees and sold only faucets online. Since 2000, Build has added multiple lines of home improvement categories and has increased staff to more than 680. Build continues to expand the availability of inventory to the public and provides consumers an option to shop for home improvement products at their own convenience.

Build is a wholly-owned subsidiary of Ferguson Enterprises, Inc. Training will be conducted at the Chico location. This will be Build's first ETP Agreement.

PROJECT DETAILS

To improve internal processes and continue growth, Build is focused on leadership development for managers and staff. Training will focus on customer service, product knowledge, effective

communication, and other job-specific topics. Trainees will be cross-trained and have more opportunity to promote.

In addition, Build is adding new software such as a Customer Relationship Manager (CRM) and an integrated Human Resources/Learning Management System (HR/LMS). Extensive training on the Company's new CRM Platform and HR/LMS system will provide employees with skills to navigate the systems and proficiently perform their job duties.

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.

Build forecasts a 20% hiring growth within the next two years, which will bring their employee population to around 820 employees. This is due to the increase of online traffic from increasing product lines and the diversity of manufactures for each product line. Additional staff is needed to keep up with product demand. Build has committed to hiring 35 new employees (Job Number 2). The date-of-hire for all trainees will be within the three-month period before contract approval or within the term-of-contract. Trainees will be hired into "net new jobs" as a condition of contract.

Training Plan

Training will be delivered via Classroom/Laboratory and Computer-Based Training methods. In-house subject-matter experts and vendors may be utilized to deliver training in the following:

Business Skills: Training will be offered to all occupations. Training will focus on effective communication and product knowledge. Training topics include Call Training, Brand Product Knowledge, Time Management, and Vendor Relations.

Computer Skills: Training will be offered to all trainees. Training will focus on in-house software, the new learning management system, and other software that Build currently uses. Training topics include Adobe Analytics, Data Projects, Jira, and Secure Coding.

Continuous Improvement: Training will be offered to all trainees. Training will focus on leadership skills, time management, and relationships with customers and vendors. Training topics include Escalations, Leadership, Presentation Skills, and Vendor Relations.

Management Skills: Training will be offered to frontline Managers and those interested and/or training for management. Training will focus on effective management styles. Training topics include Leadership Styles, Mentoring, and Management Responsibilities.

Computer Based Training (CBT)

Build will be providing training on installation and product knowledge. CBT will only be provided to specific job occupations.

Veterans Program

The Panel has established a higher reimbursement rate and other incentives for training California veterans. Build has identified approximately 15 Veterans (Job Number 3) who have served on active full-time duty in the Armed Forces. Veterans will receive a higher reimbursement rate of \$22 per hour.

Commitment to Training

This Fiscal Year 17/18, Build has spent approximately \$87,525 on job related trainings and software changes. ETP funds will not displace Build'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

A dedicated Training Specialist will oversee training and administration of the ETP Contract. Two additional staff members from the training department will assist with scheduling and overseeing training as well as collecting, submitting, and uploading training rosters to ETP Online Tracking.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

BUSINESS SKILLS

- Be the Hero
- Bid Management- Pay Per Click (PPC)
- Blueprint
- Brand Days
- Brand Product Knowledge
- Build.com Pro Tools
- Business Decision Making
- Call Training
- Construction Timelines and Bids
- Convincing Your Audience
- Creating Bill of Ladings (BOL)
- Freight Claims
- Key Performance Indicators (KPI) and Metric Breakdowns
- IT Training
- Lighting Direct (LDI) Product Knowledge Training
- Leads List Approach
- Liquidation
- Merchandiser Collaborative Training
- Pay Per Click (PPC) Marketing
- Pros and Your Value Proposition
- Pro Ownership
- Pro Sales
- Processing and Amending Orders
- Processing Credits
- Product Team Needs Training
- Risk Sourcing
- Strengths Training
- Text Ad Creation & Optimization
- Time Management
- Vendor Relations

COMPUTER SKILLS

- 360PI (Pricing Intelligence)
- 90-Day Training (Advanced Excel)
- AdHoc
- Adobe Analytics
- Birst
- Coding at Build- New Hire
- Construct Training
- CRM Platform
- Data Projects
- Electronic Data Interchange (EDI)
- Excel (Intermediate and Advanced)
- Fileserver

- File Transfer Protocol (FTP) Usage
- General SQL (Structured Query Language)
- Google Suite (Advanced)
- Groove
- HR/LMS System
- Jira
- Marketplace Specialist 1
- Order Management Console (OMC)
- Omniture
- Quick Adds
- Salesforce
- Secure Coding
- Selligent
- Structured Query Language (SQL)
- Tracker Trainings
- Vendor Information Tool

CONTINUOUS IMPROVEMENT

- Customer Experience Training
- Email Best Practices
- Engaging with Pros
- Escalations
- Leadership
- Presentation Skills
- Pricing
- Product Knowledge
- Time Management
- Vendor Relations

MANAGEMENT SKILLS (Managers/Supervisors only)

- Building Your Team
- Communication
- Horizontal Leadership
- Leadership Styles
- Management Responsibilities
- Mentoring
- Payroll System
- Situational Leadership
- SMART Goals
- Transitioning to Management

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

CBT Hours

0-40

BUSINESS SKILLS

- | | |
|--|------------|
| • Blueprint Leadership Online Supplement | 1 hour |
| • Escalation Training | 0.5 hours |
| • Risk Online Supplement | 1 hour |
| • SMART Goals | 0.25 hours |
| • Sourcing | 0.5 hours |

COMPUTER SKILLS

- Adobe Analytics 0.5 hours
- Birst 0.25 hours
- Email Subscriber 0.25 hours
- Information Security & Software Security: for the Technology Team 0.5 hours
- Information Security Annual Training 0.25 hours

CONTINUOUS IMPROVEMENT

- American Standard Brand Specialist Training 0.25 hours
- Baldwin/Kwikset Brand Specialist Training 0.25 hours
- Brizo Brand Specialist Training 0.25 hours
- Broan-Nu Tone Brand Specialist Training 0.25 hours
- Convincing your Audience Online Supplement 1 hour
- Delta Brand Specialist Training 0.25 hours
- Digital Assets 1 hour
- Duravit Brand Specialist Training 0.25 hours
- Elkay Brand Specialist Training 0.25 hours
- Generation Brand Specialist Training 0.25 hours
- Grohe Brand Specialist Training 0.25 hours
- Hansgrohe Brand Specialist Training 0.25 hours
- Hinkley Brand Specialist Training 0.25 hours
- Hunter Brand Specialist Training 0.25 hours
- Heating, Ventilation, Air Conditioning (HVAC) 0.5 hours
- Ice Makers 0.5 hours
- Jacuzzi Brand Specialist Training 0.25 hours
- JIRA 101 1 hour
- Kegeators 1 hour
- Kichler Brand Specialist Training 0.25 hours
- Kohler Brand Specialist Training 0.25 hours
- Major Residential Appliances 0.5 hours
- Maxim Brand Specialist Training 0.25 hours
- Moen Brand Specialist Training 0.25 hours
- Nest Brand Specialist Training 0.25 hours
- Pfister Brand Specialist Training 0.25 hours
- Progress Brand Specialist Training 0.25 hours
- Quoizel Brand Specialist Training 0.25 hours
- Top Knobs Brand Specialist Training 0.25 hours
- Vendor Account Mangement (VAM) Training Guide 1 hour
- Warranties 0.5 hours
- Wine Cellars 0.5 hours
- Wine Coolers 0.5 hours

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



RETRAINEE - JOB CREATION

Training Proposal for:

Charlie's Enterprises, Inc. dba OK Produce Inc.

Agreement Number: ET18-0228

Panel Meeting of: May 24, 2018

ETP Regional Office: Sacramento

Analyst: K. Mam

PROJECT PROFILE

Contract Attributes:	Retrainee Job Creation Initiative HUA	Industry Sector(s):	Wholesale Trade Warehousing Services Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Counties Served:	Fresno	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No General Teamsters Union Local No. 431		
Number of Employees in:	CA: 413	U.S.:413	Worldwide: 413
<u>Turnover Rate:</u>	13%		
<u>Managers/Supervisors:</u> (% of total trainees)	8%		

FUNDING DETAIL

<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">Program Costs</td></tr> <tr><td style="text-align: center;">\$248,325</td></tr> </table>	Program Costs	\$248,325	-	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">(Substantial Contribution)</td></tr> <tr><td style="text-align: center;">\$0</td></tr> </table>	(Substantial Contribution)	\$0	=	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">(High Earner Reduction)</td></tr> <tr><td style="text-align: center;">\$0</td></tr> </table>	(High Earner Reduction)	\$0	=	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">Total ETP Funding</td></tr> <tr><td style="text-align: center;">\$248,325</td></tr> </table>	Total ETP Funding	\$248,325
Program Costs														
\$248,325														
(Substantial Contribution)														
\$0														
(High Earner Reduction)														
\$0														
Total ETP Funding														
\$248,325														

In-Kind Contribution:	100% of Total ETP Funding Required	\$690,000
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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 HUA	Computer Skills, Cont. Imprv, Commercial Skills, HAZWOPER	355	8-200	0	\$615	*\$12.53
				Weighted Avg: 41			
2	Retrainee Job Creation Initiative HUA	Computer Skills, Cont. Imprv, Commercial Skills, HAZWOPER	30	8-200	0	\$1,000	*\$11.00
				Weighted Avg: 50			

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

Minimum Wage by County: Job Number 1 (Retrainee): \$12.53 per hour for Fresno County. Job Number 2 (Job Creation): \$11.00 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 \$1.53 per hour may be used to meet the Post-Retention Wage for Job Number 1.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Administrative Staff		21
Customer Service Staff		23
Drivers		74
IT Staff		2
Lead Staff		13
Maintenance Staff		9
Marketing Staff		17
Receiving Staff		22
Shipping Staff		92
Support Staff		40
Warehouse Staff		14
Manager		9
Supervisor		19
Job Number 2 (Job Creation)		
Shipping Staff		30

INTRODUCTION

Founded in 1950 and headquartered in Fresno, Charlie's Enterprises, Inc. dba OK Produce Inc. (OK Produce) (www.okproduce.com) warehouses and distributes fruits and vegetables for grocery store distributors, food manufacturers, and government entities such as the Fresno Unified School District and California Department of Corrections and Rehabilitation prison system. The Company has a single facility in Fresno. This will be OK Produce's first ETP Agreement.

Union Support

Workers are represented by General Teamsters Union Local No. 431. The letter of support is provided.

PROJECT DETAILS

OK Produce recently relocated to a new, larger facility with more loading docks. Given the space expansion, the Company purchased a new Evapco refrigeration system and new equipment for the receiving docks including powerjacks, hoists and forklifts. The Company maintains its refrigeration services and equipment, necessitating staff be trained on maintaining, servicing, and troubleshooting equipment.

The Company will implement a training plan focused on improving productivity, efficiencies, and quality control to ensure stringent delivery standards are met. The Company has also implemented a minimal waste environment by switching to electronic communication through the use of new workstations, tablets, and transportation cells.

Retrainee - Job Creation

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

With the increase in space at their new facility, OK Produce has identified the need to hire 30 new Shipping Staff (Job Number 2) to handle the additional shipping docks. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. Trainees will be hired into "net new jobs" as a condition of contract.

Training Plan

Training will be delivered via classroom/laboratory methods. In-house subject matter experts and vendors may be utilized to deliver training in the following:

Computer Skills: Training will be offered to all occupations. Training will focus on new technology training. Training topics include Material Resource Planning, Roadnet Routing for Delivery, and eTime/Paycom.

Continuous Improvement: Training will be offered to all occupations. Training will focus on improving efficiencies. Training topics include Communication, Change Management, and Quality Control.

Commercial Skills: Training will be offered to all occupations. Training will focus on service and maintenance of equipment. Training topics include Machine Set Up and Maintenance, Equipment Operations, and Warehouse Operations.

Certified Safety Training

Hazardous Waste Operations and Emergency Response Standard (HAZWOPER). This training is a series of courses designed for workers who handle hazardous substances as first-responders, or clean-up hazard disposal or emergency sites. Training consists of 40 hours of classroom or CBT training for workers stationed at the hazard sites, and 24 hours for workers who visit the site (e.g., engineers). Administrative Staff, Lead Staff, Support Staff, Warehouse Staff, Drivers, Shipping Staff, Receiving Staff, and Maintenance Staff will receive training. Field training is also required, although that will not be 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. Only trainees who work full time onsite at the clean-up location will receive 40 hours.

Commitment to Training

ETP funds will not displace OK Produce'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. The Company invests over \$125,000 annually on training, including new hire orientation, sexual harassment prevention, and safety training.

➤ Training Infrastructure

The HR Director and two HR Generalists will coordinate all training efforts. Additionally, the Company has retained the services of a third-party administrator with extensive ETP Administration experience to assist with project administration.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

BLI Co. of Salida assisted in the development of this proposal for a flat fee of \$8,000.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

Michael Schreck of PSIG, Inc. in Oakhurst has been retained to provide industrial refrigeration training (Commercial Skills) for a fee of \$7,500. Other trainers will be identified for ETP record-keeping purposes, as they are retained by OK Produce.

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

8-200 Trainees may receive any of the following:

COMPUTER SKILLS

- + AFS: Enterprise Resource Planning (ERP), Order Management System (OMS) and Warehouse Management System (WMS) – Phase I
- + Human Resource Information System (HRIS)
- + Material Resource Planning
- + Microsoft Office (Intermediate/Advanced)
- + Roadnet Routing for Delivery
- + SharePoint (Cloud/Microsoft Platform)
- + eTime/Paycom

CONTINUOUS IMPROVEMENT

- + Change Management
- + Communications
- + Leadership Skills
- + Order Picking and Packaging
- + Performance Management
- + Problem Solving
- + Productivity Improvement
- + Quality Control
- + Time Management
- + Train the Trainer

COMMERCIAL SKILLS

- + Business Continuity Plan Review
- + Compliance and Set Up
- + Electrical Introduction
- + Equipment Operations
 - o Refrigeration
 - o Evaporators
 - o Condensers
 - o Compressors
 - o Valves and Vessels
 - o Scissor Lifts
 - o Palletizers
 - o Loading Dock Stabilizers/Leveler
 - o Employee Scanners
- + Laboratory Practices
- + Machine Setup and Maintenance
- + Operating Industrial Lifts
- + Operating Standards
- + Product Withdrawal and Recall Procedures
- + Sampling Procedures
- + Sanitation Practices
- + Warehouse Operations
- + Warehousing Practices

HAZWOPER

- ✚ HAZWOPER Refresher (must compute 8 hours)
- ✚ HAZWOPER (24-hour course)
- ✚ HAZWOPER (40-hour course)

Safety Training will be limited to 10% of total training hours per-trainee (This cap does not apply to HAZWOPER)

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

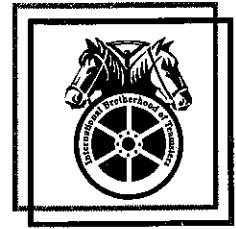
GENERAL TEAMSTERS UNION LOCAL NO. 431

*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 Willshow

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



January 24, 2018

Employment Training Panel
1100 "J" Street
Sacramento, CA 95814


RE: **Participation in the California Employment Training Panel**

Dear Employment Analyst:

As the President of General Teamsters Local No. 431 we support the participation of our members at OK Produce in the training provided in the ETP project. We support this training as it is something we do not offer internally to our members. This training is also specific to their facilities environment and outside of our membership's qualifications.

Thank you in advance for your consideration in allowing our OK Produce members to participate in the training provided by the ETP project. If I can be of further assistance, please do not hesitate to call.

Sincerely,



Peter Núñez
President
General Teamsters Union Local No. 431



**TRAINING PROPOSAL FOR
CSP Fiber Services
17-0880**

Panel Meeting Date: 05/24/2018
Regional Office: North Hollywood Regional Office
Analyst Name: Mark Reeves
Type of Proposal: Single Employer
Funding Source: SET

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 187,318.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 187,318.00	N/A	\$ 0.00	\$ 205,800.00

APPLICANT PROFILE

Company Summary	CSP Fiber Services (CSP) is a telecommunication services company headquartered in Long Beach.
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Industry Sector(s)	Information		
Priority Industry	Yes		
No. Employees (Applicant)	State: 200	US: 200	World Wide: 200
Turnover Rate (Applicant)	10.00 %		
Repeat Contractor	No		
High Unemployment Area	Yes		
Union(s)	No		

TRAINING PROFILE

Training Objective(s)	The objective of training is to equip workers with up-to-date knowledge and skills needed to keep pace with rapidly changing telecommunications hardware and software technology.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	99	\$ 18.00	49	\$ 882	8 - 200
2	Job Creation – Retrainee Initiative Program, Retrainee	50	\$ 20.00	100	\$ 2,000	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 2003, and headquartered in Long Beach, CSP provides telecommunication services including cable and internet installation and wiring. CSP customers include Charter Communications (Charter) and Spectrum Communications (Spectrum) for which CSP handles overflow of installations for residential and commercial customers. CSP also has Southern California locations in Anaheim, La Puente, Hesperia, and Los Angeles.

2. Current Training Project Details

Purpose of Training	<p>The proposed training is primarily driven by customer demand (Charter and Spectrum) that CSP meet specific requirements as their installation vendor. These requirements include the use of client-preferred specialty tools, equipment and materials; working knowledge of each service provider's diverse line of video/internet/voice products; proprietary quality control measures; and client-specific customer relations procedures.</p> <p>Due to continuous growth, CSP must develop worker skills to complete a higher volume of jobs in a more timely and efficient manner. Training will focus on product knowledge, communication, installation skills, customer relations (service activation/connection), inventory control, equipment usage, and local area networks.</p> <p>All training will take place at the Company's Long Beach headquarters facility. Course instruction will be provided by in-house subject matter experts.</p>
Training Infrastructure and Administrative Plan	<p>CSP has a current training budget of approximately \$100,000. The Company's Operations Manager has prior ETP experience and will oversee project administration. In addition, a cross-functional team of Human Resources staff and department heads will assist with enrolling trainees, scheduling training, and tracking training hours. CSP has also retained an administrative consultant to ensure that training and documentation meet ETP requirements.</p>
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

PROPOSED TRAINING PROJECT DETAILS

3. Curriculum Summary

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

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

4. Additional Company or Training Project Details

Retrainee – Job Creation

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

CSP has experienced rapid growth, adding approximately 90 employees to its workforce over the past 12 months. The Company is in the process of expanding its reach northward into the Bay Area market. Therefore, CSP has committed to hiring 50 new Technicians (Group 2) to support the Company’s business expansion efforts. Newly-hired trainees will receive an average of 100 hours of ETP-funded training.

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

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Judiths Training Services	Los Angeles	\$ 13,500.00
Administrative	Judiths Training Services	Los Angeles	13% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

N/A

PROPOSED TRAINING PROJECT DETAILS

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Billing
	Communication
	Customer Relations
	Inventory Control
	Product Knowledge
	Sales
	Strategic Planning
	Telephone Skills
Commercial Skills (Standard)	Cable placement
	Cross training equipment and skills
	Equipment loading
	ladder handling
	Pole Climbing
	Quality Control
	Telecommunications
	Tool Usage
	worksite safety
Computer Skills (Standard)	Local Area Networks
	World Wide Web
Continuous Improvement Skills	Decision Making
	Quality Control



**Training Proposal for:
Farmers Group, Inc.**

Agreement Number: ET18-0217

Panel Meeting of: May 24, 2018

ETP Regional Office: North Hollywood

Analyst: L. Vuong

PROJECT PROFILE

Contract Attributes:	Retrainee SET HUA	Industry Sector(s):	Insurance Services Priority Industry: <input type="checkbox"/> Yes <input checked="" 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		
Number of Employees in:	CA: 4,546	U.S.: 20,487	Worldwide: 20,487
<u>Turnover Rate:</u>	12%		
<u>Managers/Supervisors:</u> (% of total trainees)	18%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$220,200		\$0	\$0		\$220,200

In-Kind Contribution:	100% of Total ETP Funding Required	\$293,600
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee	Business Skills, Commercial Skills, Computer Skills	75	8-200	0-20	\$600	\$17.54
				Weighted Avg: 40			
2	Retrainee SET	Business Skills, Commercial Skills, Computer Skills	166	8-200	0-20	\$600	\$30.36
				Weighted Avg: 40			
3	Retrainee SET HUA	Business Skills, Commercial Skills, Computer Skills	126	8-200	0-20	\$600	*\$12.53
				Weighted Avg: 40			

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

Minimum Wage by County: Job Number 1: \$17.54 per hour for Los Angeles;

Job Number 2 (SET/Statewide): \$30.36 per hour; and

Job Number 3 (SET/HUA): \$12.53 per hour for Fresno, Kern, San Bernardino 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 \$2.17 per hour may be used to meet the Post-Retention Wage in Job Numbers 1 & 2.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Claims Staff		61
Operations Support Staff		5
Manager/Supervisor		9
Job Number 2		
Claims Staff		108
Operations Support Staff		5
Manager/Supervisor (Frontline)		53
Job Number 3 (HUA)		
Claims Staff		118
Operations Support Staff		4
Manager/Supervisor (Frontline)		4

INTRODUCTION

Headquartered in Woodland Hills, Farmers Group, Inc. (Farmers) (www.farmers.com) provides a wide range of insurance and financial service products for vehicles, homes and small business. The Company provides more than 30 million policies across the nation and employs approximately 20,487 employees through exclusive and independent agents.

Farmers has 37 locations that will participate under this Agreement. Of the 37 locations, five are located in a High Unemployment Area (HUA). All trainees located in an HUA area will be enrolled in a separate Job Number to differentiate a lower minimum wage requirement. The majority of training (90%) will be conducted at the Farmers University campus located in Agoura Hills; and the remainder will be conducted at the Company's facilities throughout the state.

PROJECT DETAILS

This is Farmers' fourth ETP Agreement, and the third in the last five years. Previous training focused on business operations, process improvement, and internal systems. Training under this proposal will concentrate on new technology, new business, upgrade worker job skills, increase services, standardize processes and procedures across all facilities, comply with insurance requirements and support company growth. In addition, Farmers is implementing new training programs and occupations. ETP funds will help the Company deliver formalized training to its workforce to enhance job security, providing employees the necessary tools to be successful in their jobs and contribute to the Company's success.

The Company is operating in a highly competitive insurance industry. As such, Farmers constantly strives to exceed customer expectations. Its goal is to upgrade worker skills keep up with advanced technologies, and improve customer services, which includes redesign processes, workflow and services to meet changing needs.

With the success of its prior ETP Agreement, Farmers has experienced a 3% growth in business. To keep up with this growth, the Company has invested over \$317 million in new software such as ClaimCenter System, which will increase productivity. In addition, the Company plans to expand its business to Florida in 2018, build a more knowledgeable workforce, back fill jobs vacated by retired workers, and adapt to new technology.

Training Plan

Training will be provided via Classroom/Laboratory, Videoconference and Computer-Based Training (CBT) in the following:

Business Skills: Training will be offered to all occupations and focus on project management skills, lean concepts, decision-making skills, strategic and creative thinking. The end result is expected to be more engaged employees who can contribute to the betterment of the organization by creating and implementing new ideas and processes. The training will supplement their job knowledge specific to Farmers' business, which will enhance customer service through improved communications skills, business writing skills, negotiation skills, and time management skills.

Commercial Skills: Training will be offered to all occupations and help trainees to handle various claim types from customers and policyholders. Training will increase worker skill sets that are required in the industry.

Computer Skills: Training will be offered to all occupations to support business operations. Trainees will learn to effectively use the Company's current and new complex systems to provide efficient and effective claims processes, customer services, tools to perform their job functions and the ability to navigate the systems.

Frontline Worker

Farmers will train frontline Managers and Supervisors. These employees communicate and interact with customers and members, and are available to provide services at all time. These individuals spend 100% of their time performing frontline work and do not hire, fire or make company policy. Based on the nature and scope of their job duties, these trainees meet the Panel's definition of frontline workers. As frontline workers, these trainees qualify for SET funding.

Commitment to Training

Farmers invests in its employee's education through its Farmers University. The university focuses on recruitment and training of insurance agents. Traditional and eLearning training methods are used to create an employee-driven learning environment. Farmers will continue to provide training at its own expense, which includes seminars for executive staff, new hire onboarding, basic industry overview, beginner technical skills and internet navigation, sexual harassment prevention, and compliance and ethics training. The Company expects to spend approximately \$9.9 million to train its workforce over the next year.

➤ Training Infrastructure

Training is scheduled to begin upon Panel approval and will be delivered on-site by Farmers University staff and 38 in-house experts and vendors as needed. Farmers has designated a team that includes a Learning Management System Administrator, Human Resources staff and Farmers University staff to oversee ETP training and all administrative responsibilities, including enrollment, scheduling, tracking and uploading training in the ETP Online System using the Company's Learning Management System (LMS), verify training and retention completion and ensure compliance with all ETP requirements.

Staff has reviewed and approved Farmers LMS. The Company's LMS will electronically document all training.

Substantial Contribution

Although Farmers is a repeat contractor, substantial contribution does not apply because the contractor has not earned \$250,000 or more at a single facility within the past five years.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0280	Statewide	12/14/15 – 12/13/17	\$186,400	\$185,469 (99%)
*ET13-0201	Statewide	12/31/12 – 12/30/14	\$320,000	\$202,633 (63%)

*ET13-0201 – Although much training was provided less was recorded in ETP system due to administrative issues with the third party administrator. In the subsequent Agreement, Farmers successfully performed its own administration and earned nearly 100% of funding. In this proposed project, Farmers will again do its own administration and successfully manage training as it did in previous project.

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

- Borderless Thinking
- Business Performance
- Claims Leadership Experience
- Communication Skills
- Critical Thinking
- Customer Connections
- Customer Engagement
- Customer Expectation
- Intermediate Coaching
- Leadership Training
- Lean Concepts
- Product Knowledge
- Project Management
- Quality Assurance Training
- Supervisor Continuum Training
- Time Management
- Train-the-Trainer skills

COMMERCIAL SKILLS

- Advanced Driver Assistance Systems Training
- Anti-Fraud Claim Training
- Auto Physical Damage Training
- Auto Physical Damage Advance Training
- Auto, Property, Liability, Med/PIP Training
- Business Insurance Claims Training
- Business Insurance Commercial Auto Claims Training
- Business Insurance Commercial Liability Claims Training
- Business Insurance Commercial Property Claims Training
- Catastrophe Corp Training
- Catastrophe Just-in-Time
- Claims Litigation Training
- Claims Policy Training
- Contact Center Training
- Coverage Training
- Earthquake Training
- Estimating Training
- Guaranteed Repair Program Training
- Liability Claim Advance Training
- Liability Claims Training
- Medical/Personal Injury Protection Claims Training
- Ownership Model
- Property Claims Advance Training
- Property Claims Training

- Property Loss Claims Training
- Recreational Vehicle Training
- Regional Claims Training
- Special Investigation Unit Training
- Specialty Marine Training
- Specialty Motorcycle Training
- Spine Anatomy (Claim)
- Subrogation Training
- Suit Against Exchange
- Traumatic Brain Injury
- Workers Compensation Advance Training
- Workers Compensation Fundamental

COMPUTER SKILLS

- CCC Estimating System (Software)
- ClaimCenter System
- Enservio
- HEART
- Injury Evaluation System
- LNAV Tool
- Microsoft Applications (Intermediate/Advanced)
- Xactimate

CBT Hours

0-20

BUSINESS SKILLS

- Achieving Meaningful Communication (30 mins)
- An Introduction to Project Management (2 hours)
- Available Presentation Resources (4 hours)
- Borderless Thinking (33 minutes)
- Communication Skills (4 hours)
- Communication Tools (2 hours)
- Critical Thinking (5 hours)
- Customer Connections (1 hour, 10 minutes)
- Customer Experience - The Basics (1 hour)
- Effective Team Communication (1 hour)
- Farmers Professional Advantage - Presentation Skills (1 Hour)
- Farmers Professional Advantage: Creativity (1 hour)
- Farmers Professional Advantage: Setting and Managing Priorities (1 hour)
- GEN1159: Professional Correspondence (30 minutes)
- GEN1202: Customer Connections (1 hour 10 minutes)
- GEN1203: Customer Connections II (6 hours)
- GEN7001: Policy Selection Tool (15 Minutes)
- GEN7003: Customer Expectations My Impact (45 minutes)
- GENLEAD5001: Coaching Connections (1 hour 30 minutes)
- GENLEAD5002: Coaching Connections Level 2 (1 hour 15 minutes)
- GENLEAD5003: Connections 3 - Level 2 (2 hours)
- GENLEAD5004: Connections 3: Emotional Intelligence (1 hour)

- GENLEAD5005: Connections 3: Emotional Intelligence 2 (1 hour)
- Introduction to the ZurichLean Program (45 minutes)
- KAPLAN: Effective Business Writing (1 hour)
- KAPLAN: Negotiation Skills (1 hour)
- LEAD5011: Introduction to the Quality Thinking Process (30 minutes)
- LIF105: Effective Presentation Skills (40 mins)
- Overview to Effective Business Communication (3 hours)
- Peer Relationship (1 hour)
- Power Up! - My Company (2013.2), (2 hours, 30 minutes)
- Project Management Basic Training (45 minutes)
- SI3004: Effective Project Execution eModule (45 minutes)
- Skillsfot: Risk Advice (2 hours)
- SkillSoft - Achieving Success: the Help of a Mentor (3 hours)
- SkillSoft - Business Writing: Know Your Readers and Your Purpose (1 hour)
- SkillSoft - Communication Skills for Resolving Conflict (5 hours)
- SkillSoft - Conflict: Avoid, Confront or Delay (3 hours)
- SkillSoft - Customer Service Confrontation and Conflict (1 hour)
- SkillSoft - Customers, Conflict and Confrontation (6 hours)
- SkillSoft - Defining Emotional Intelligence (2 hours)
- Skillsoft - Effective Critical Analysis (1 hour)
- SkillSoft - Lean Value (4 hours)
- SkillSoft - Managing a Project with Your Team (3 hours)
- SkillSoft - Managing Time (1 hour)
- SkillSoft - Negotiation Essentials: Communicating (1 hour)
- SkillSoft - Problem Solving and Decision Making (2 hours)
- Time Management Skills for Adjusters (1 hour)
- Writing for Business (1 hour)

COMMERCIAL SKILLS

- Active vs. Passive Treatment (13 minutes)
- Addressing Potential Coverage Issues (1 hour)
- APD Vehicle Scope Doc. for Hail and Image Reflection (10 minutes)
- APD101: Acceleration Advanced Refinish (45 minutes)
- APD101: Acceleration Auto Materials (45 minutes)
- APD101: Acceleration Restraint Systems (45 minutes)
- APD101: Acceleration Shop Inspections, (45 minutes)
- APD101: Acceleration Specialized Units (45 minutes)
- APD101: Acceleration Steering and Suspension (45 minutes)
- APD101: Acceleration Total Loss Concepts (45 minutes)
- APD101: Acceleration Under the Hood (45 minutes)
- APD101: Ignition Basic Refinish (45 minutes)
- APD101: Ignition Coverage (30 minutes)
- APD101: Ignition Customer Contact (45 minutes)
- APD101: Ignition Customized Equipment (30 minutes)
- APD101: Ignition Dents and Scratches (45 mins)
- APD101: Ignition File Documentation (45 mins)
- APD101: Ignition Heart Basics (30 mins)
- APD101: Ignition Liability (30 mins)
- APD101: Ignition Loss of Use - K Coverage (45 mins)

- APD101: Ignition Loss of Use (45 mins)
- APD101: Ignition Part Types (45 mins)
- APD101: Ignition Payments (45 mins)
- APD101: Ignition Photography (45 mins)
- APD101: Ignition Policy Basics (45 mins)
- APD101: Ignition Repair vs. Replace (45 mins)
- APD101: Ignition Repair Welded Panels (45 mins)
- APD101: Ignition Replace Welded Panels (9/9/15), (30 minutes)
- APD101: Ignition Replacement Parts (45 mins)
- APD101: Ignition Smart Estimate (45 mins)
- APD101: Ignition Vehicle Construction (45 mins)
- APD101: Ignition VIN Interpretation (45 mins)
- APD101: Ignition Customized Equipment, ()
- APD1011: Vehicle Nomenclature (30 minutes)
- APD1112: Settlement and Payment Coding Guidelines (30 minutes)
- APD1119: Unrelated Prior Damage Deduction (20 minutes)
- APD1125: APD Employee Safety During Vehicle Inspections (30 minutes)
- APD1135: Tear Down (30 minutes)
- APD1136: APD Estimatics (45 minutes)
- APD1140: Steering and Suspension - Part 1 (30 minutes)
- APD1145: Creating Rental Units (30 mins)
- APD1146: Maintaining Rental Units (45 minutes)
- APD1148: APD Frame Repair (30 minutes)
- APD1150: GRP and GRP Drive In Assignments Course (20 minutes)
- APD1151: Paintless Dent Repair PDR (30 mins)
- APD1154: Recycled Part Usage (45 mins)
- APD1156: Route 20/20 Improving Your File Vision (1 hour 30 minutes)
- APD155: Denial Letter Training (1 hour)
- APD2111: APD Flood Losses Inspections and Estimatics (20 minutes)
- APD2204: APD Tool Use Training (30 minutes)
- APD221: Total Loss Critical Thinking - Do the Right Thing (20 mins)
- APD305: APD Re-Inspections (30 mins)
- Auto CAT Readiness Intro Video (10 minutes)
- Auto Foundations Claims Process Overview (15 minutes)
- Auto Policies (2 hours)
- Auto Policy - Conditions and Endorsements (1 hour)
- Auto Policy - Damage to Your Car (20 minutes)
- Auto Policy - Introduction to Policy Structure (40 minutes)
- Auto Policy - Liability (1 hour)
- Auto Policy - Medical Payments (25 minutes)
- Auto Policy - Uninsured and Uninsured Motorist (20 minutes)
- AUTO1101: Auto Collision Deductible Waiver (30 minutes)
- AUTO1106: Total Loss Salvage Best Practices and Standards (30 minutes)
- AUTO1107: Auto Foundations Clean Desk Standards (30 minutes)
- AUTO1108: Total Loss Express (30 minutes)
- Beyond the Basics Coverage-Concurrent Causation Course (3 hours)
- BI1105: COMM Risk Advice eLearning Module (35 minutes)

- BI1110: Commercial Ride Sharing and Vehicle Sharing (30 minutes)
- BI1115: Business Insurance Self Directed Triage (30 minutes)
- BIAUTO1106: Business Insurance Journal (1 hour)
- BICOMM1105: Commercial Risk Advice (3 hours)
- Billing Modalities as Procedures (1 hour)
- BIPROP2217: Commercial Property Business Income Losses (30 minutes)
- Body Shop Fraud (1 hour)
- Bulling Supervised Modalities as Constant Attended (1 hour)
- CA Next Gen 2.0 - Advanced - Service Operations (15 mins)
- CAS1101: Second Tow (1 hour)
- CAS1103: Material Misrepresentation Course (30 minutes)
- Casualty Insurance Fraud (1 hour)
- CAT Corps: Introduction to CAT Corps Course (Catastrophe) (2hours)
- CATCORPS1101: Travel Deployment (1 hour 35 minutes)
- CATCORPS1103: Introduction to CAT Corps. (30 minutes)
- CGL - Covered Work (PLRB) (1 hour)
- CGL - Faulty Workmanship (PLRB) (1 hour)
- CGL Care Custody and Control Exclusion (PLRB) (1 hour)
- CGL Particular Part j5 and j6 (PLRB) (1 hour)
- Claims Process Overview (80 minutes)
- Classic Car Insurance Fraud (1 hour)
- COMM: Locating Business Insurance Policies (30 minutes)
- Commercial Evaluation (20 mins)
- Commercial Negotiations (20 mins)
- Commercial Professional Liability (30 mins)
- Commercial Property Boiler & Machinery Losses (4 hours)
- Commercial Property: Non Program Vendors Referral Process (30 mins)
- Commercial: Self Directed Triage (30 mins)
- Comparative and Contributory Negligence Concepts (PLRB) (1 hour)
- Contractor Vendor & Provider Fraud Overview (1 hour)
- CPT Codes (1 hour)
- Data Security and Claims (30 minutes)
- Dime Spinning & Mechanical Damage (Hail) (1 hour)
- Drug Compounding (1 hour)
- Drying Evaluation and Equipment (1 hour)
- Electronic First Notice of Loss (30 minutes)
- Epidural Steroid Injection(1 hour)
- Errors and Omissions - Marketing Advice Form Training (30 minutes)
- Farmers Fraud Awareness (15 minutes)
- Farmers Operating Structure - Employee Version (2014), (30 minutes)
- File Documentation CLEAN (45 minutes)
- Finalizing PowerPoint 2003 Presentations (2 hours)
- Fire and Smoke Damage Restoration (1 hour)
- Flood Damage Inspection I-CAR Video (20 minutes)
- Fraudulent Treatment (SOAP) Notes (1 hour)
- GEN1100: Negotiation Connections - Building Rapport (30 minutes)
- GEN1100: Negotiation Connections (2 hours)
- GEN1106: ICD Coding Overview (35 minutes)

- GEN1111: CA Yearly Integral Anti-Fraud Training (30 minutes)
- GEN1112: California Fair Claims Certification (30 Minutes)
- GEN1122 Terms and Acronyms (20 Minutes)
- GEN1136: Fair Claims Settlement Practices (1 hour)
- GEN1140: HEART Investigation View (30 minutes)
- GEN1230: Technology Fundamentals (20 minutes)
- GEN2100: Reservation of Rights (30 minutes)
- GEN3000: Life Care Plan (30 minutes)
- GEN3101: Anatomy of the Brain (30 minutes)
- GEN3102: Traumatic Brain Injury (45 minutes)
- GEN7004: DocuSign - An Overview (15 minutes)
- Heavy Equipment Identification, (1 hour)
- Homeowners Coverage-CA Earthquake Authority Policy (1 Hour)
- ICD Diagnosis Codes (1 hour)
- Identifying Treatment Provided by Unqualified Providers (1 hour)
- Improperly Billing Procedures (1 hour)
- Information Security Awareness (25 mins)
- Initial Bill Review (1 hour)
- Introduction to Commercial Lines Fraud (1 hour)
- Introduction to Medical Necessity of Chiropractic Manipulation (1 hour)
- Investigating Questionable Water Claims, (1 hour)
- KAPLAN: Claim Basics (3 hours)
- KAPLAN: Claim Investigation (1 hour)
- KAPLAN: Claim Statements, (30 minutes)
- KAPLAN: Commercial General Liability Coverage, (16 hours)
- KAPLAN: Delivering Quality Service (1 hour)
- KAPLAN: Interpreting Medical Reports (1 hour)
- KAPLAN: Legal Concepts and Doctrines (1 hour)
- KAPLAN: Medical Tests and Signs (1 hour)
- KAPLAN: Property and Casualty 2nd Edition (1 hour)
- KAPLAN: Residential Construction Basis, 3rd Edition (6 hours)
- L/AB502: Uninsured/Underinsured Motorists Coverage - (PLRB) (2 hours)
- LEAD 5107: Conflict Management Toolkit (30 minutes)
- LEAD5100: Trust Toolkit (30 minutes)
- LEAD5101: Anatomy of Trust (30 minutes)
- LEAD5102: Communication Toolkit (30 minutes)
- LEAD5104: Human Resources Resource Guide (30 minutes)
- LEAD5105: Teambuilding Toolkit (30 minutes)
- LEAD5106: Behavior Focused Performance Management Resources (30 minutes)
- LEAD5108: Customer Expectations Toolkit (30 minutes)
- LEAD5109: Emotional Intelligence Toolkit (30 minutes)
- LEAD5110: Transition to Leadership Toolkit (30 minutes)
- LEAD5117: Change Management Toolkit (30 minutes)
- LEAD5126: Action Planning Toolkit - Quality Thinking in Action (30 minutes)
- LEAD5127: Root Cause Analysis (11 hours 50 minutes)
- LEAD5128: Creating Meaningful Action Plans (8 hours 45 minutes)

- LIAB101: Liability Evaluation - Injury Codes (25 mins)
- LIAB101: Liability Evaluation - Intro to Evaluation (15 mins)
- LIAB1101: Critical Thinking, (2 hours)
- LIAB1101: Liability Evaluation (1 hour 25 minutes)
- LIAB1101: Liability Initial Contact (25 minutes)
- LIAB1101: Liability Investigations (2 hours)
- LIAB1101: Policy Contract Interpretation (4 hours 40 minutes)
- LIAB1101: Settlement/Payment/Proper Release (1 hour)
- LIAB1103: Legal Basics (1 hour 30 minutes)
- LIAB1104A: Critical Thinking - Evaluation (3 hours 20 minutes)
- LIAB1105 - Recorded Statements (30 minutes)
- LIAB1107: Spine - Non-Surgical (45 minutes)
- LIAB1135: Homeowners Policy Review,(30 minutes)
- LIAB1140: Damage Evaluation (2 hours)
- LIAB1150: Crush vs. Contact (10 minutes)
- LIAB1150: Delta V & Principle Direction of Force (30 minutes)
- LIAB1150: Early Low Velocity (2 hours)
- LIAB1150: Injury Mechanism Occupant Kinematics and Injury Tolerance (21 minutes)
- LIAB1150: Newtonian Physics (10 minutes)
- LIAB205B: Coverage Letter Writing (45 minutes)
- LIAB214: Mediation (45 mins)
- LIAB2205: Auto Policy Course (30 minutes)
- LIAB2207 The Surgical Spine (1 hour 30 minutes)
- LIAB2208 Evaluation - The Knee (45 minutes)
- LIAB2209: The Shoulder Course 30 minutes
- LIAB3000: Spine Anatomy and Treatment (1 hour 35 minutes)
- LIAB3301: Advanced Litigation (6 Hours 45 minutes)
- LIAB507: Strategy Expectations Course (30 mins)
- LIAB518: Anatomy - Performance Support (NLC) (15 mins)
- LIAB523: Wrongful Death Course (30 mins)
- LIAB5510: Managing Litigation (30 minutes)
- LIAB5512: Premises Liability II (30 minutes)
- LIAB5514: Selecting the Right Expert (30 minutes)
- LIAB5515: Joint And Several Course (30 minutes)
- LIAB5519: Medical Evaluation of Complex Injuries (30 minutes)
- LIAB5520: Fractures (30 minutes)
- LIAB5521: Scarring & Disfigurement (30 minutes)
- LIAB5523: Wrongful Death (30 minutes)
- LIAB6000: CA Auto Principally at Fault (15 minutes)
- Liability Negotiation Connections Videos (30 minutes)
- Liability Simulated Exercise Courses (2 hours 30 minutes)
- Liability Stackable Credentials (15 mins)
- Linking ICD Codes to CPT Codes (1 hour)
- Listening for Deception in Claims Interviews (20 minutes)
- Low Level Laser Therapy 1 hour)
- Medical Claims Training: Diabetes and Complications (30 mins)
- Medical Necessity and Overutilization of Modalities (1 hour)
- MEDPIP1100: Medical Billing Overview (30 minutes)
- Metal Theft (1 hour)

- Mold Insurance Fraud (1 hour)
- Multi-line: Mitigation and Storage Fees (20 minutes)
- Mysterious Disappearance Claims (1 hour)
- Negligence Concepts (30 minutes)
- NICTA - Listening for Deception in Claims Interviews (1 hour)
- NICTA - Video - Workers' Comp Fraud (35 minutes)
- NICTA: Investigating Vehicle Theft Fraud (45 mins)
- NICTA: Mysterious Disappearance Claims (1 hour)
- NICTA: Arson for Profit (1 hour)
- NICTA: Casualty Fraud (1 hour)
- NICTA: Catastrophe Fraud (1 hour)
- NICTA: Crash Data Retrieval (1 hour)
- NICTA: Detecting Fraud for Underwriters (1 hour)
- NICTA: Diagnostic Testing Fraud (1 hour)
- NICTA: Durable Medical Equipment Fraud (1 hour)
- NICTA: Evaluating Medical Bills for Fraud 101 (1 hour)
- NICTA: Field Safety Course, (1 hour)
- NICTA: Identity Theft/ Fraud (1 hour)
- NICTA: Ins. Fraud Investigations & CA Department of Insurance for New Hires (30 minutes)
- NICTA: Insurance Fraud Basics (1 hour)
- NICTA: Introduction to Commercial Lines Fraud (1 hour)
- NICTA: Introduction to CPT Codes in Medical Billing Fraud (1 hour)
- NICTA: Introduction to Insurance Fraud Investigation (1 hour)
- NICTA: Introduction to Medical Billing Fraud (1 hour)
- NICTA: Investigating Property Fraud (1 hour)
- NICTA: Investigating Vehicle Theft Fraud (1 hour)
- NICTA: Investigation Organized Groups (1 hour)
- NICTA: ISO ClaimSearch User Training (1 hour)
- NICTA: Listening for Deception in Claims Interviews (1 hour)
- NICTA: Medical Clinic Inspections (1 hour)
- NICTA: Modalities & Procedures Questionable Billing (1 hour)
- NICTA: NICB Questionable Claims Submission (1 hour)
- NICTA: Online Application Fraud (1 hour)
- NICTA: Organized Groups & Insurance Fraud (1 hour)
- NICTA: Pedestrian Staged Accidents (1 hour)
- NICTA: Preparing a Case for Prosecution (1 hour)
- NICTA: Rate Evasion Fraud (1 hour)
- NICTA: Recognizing Organized Insurance Fraud (1 hour)
- NICTA: Recorded Statements (30 minutes)
- NICTA: Staged Auto Accidents (1 hour)
- NICTA: The Internet: An Investigative Tool (1 hour)
- NICTA: Training Theory and Skills for Fraud Investigators (1 hour)
- NICTA: Workers' Compensation Fraud (1 hour)
- NICTA: Workers' Compensation Premium Fraud (1 hour)
- NICTA: Staged-Caused-Paper Accidents (1 hour)
- Obvious Total Loss Scope, Handling Job Aid (10 minutes)
- Owner Retained Salvage Course (2 hours)
- PDR Matrix, Explainer (10 minutes)
- Pedestrian Staged Accidents (1 hour)

- Personal Injury Protection Schemes (1 hour)
- Platelet Rich Plasma Therapy (1 hour)
- PLRB: Catastrophe Services (1 hour)
- Policy Contract Interpretation and Policy Interpretation Concepts (45 minutes)
- Prop1001 Foundations - Orientation (1 Hour)
- Prop1001 Foundations Capstone (30 minutes)
- PROP1001: Coverage ELearning (1 hour)
- PROP1001: Measuring Basics (30 minutes)
- PROP1001: Measuring Cabinets and Countertops (30 minutes)
- PROP1001: Measuring Exterior Measurements (30 minutes)
- PROP1001: Measuring Geometry (30 minutes)
- PROP1001: Measuring Interior Measurements (30 minutes)
- PROP1047: Back to Basics Asbestos Safety Awareness (45 minutes)
- PROP1047: Back to Basics Asbestos Safety Awareness (45 minutes)
- PROP1047: Back to Basics Asbestos Safety Awareness (45 minutes)
- PROP1106: Back to the Basics Subrogation (30 Minutes)
- PROP1108: Loss of Value Hail for Specialty Policies (1 hour)
- PROP1109: Back to the Basics - Additional Living Expenses (30 Minutes)
- PROP1110: Back to Basics Property Vendors - (2/24/15), (1 Hour, 30 minutes)
- PROP1111: Back to Basics Lead Based Paint (30 minutes)
- PROP1112: Back to Basics Proof of Loss (30 minutes)
- PROP1115: Back to Basics Alternative Repairs (30 minutes)
- Prop1121 Ladder Safety (30 minutes)
- PROP1122: Back to Basics - Roofing Damages (1 hour 20 minutes)
- PROP1122: Back to Basics Roofing Damages (2 hours)
- PROP1124: Back to Basics Interior Estimating (20 minutes)
- PROP1125: Back to Basics - Cabinets (30 minutes)
- PROP1126: Back to the Basics - Painting (30 minutes)
- PROP1127: Back to the Basics - Personal Property Cleaning (30 minutes)
- PROP1128: Back to the Basics - Flooring (2 hours)
- PROP1129: Back to Basics Drywall and Plaster (30 minutes)
- PROP1130: Back to the Basics – Theft, (1 hour, 45 minutes)
- PROP1131: Back to the Basics - Doors & Windows (1 hour)
- PROP1132: Back to Basics Vandalism Claims (30 minutes)
- PROP1133: Property Salvage (30 minutes)
- PROP1134: Back to Basics - Central Air Conditioning Systems (50 minutes)
- PROP1136: Back to Basics Personal Property (1 hour, 30 minutes)
- PROP1138: Communicating Effectively with our Aging Consumers (30 minutes)
- PROP1140: Back to Basics Townhouse and Condominium Claims Handling (30 minutes)
- PROP1141: Back to Basics Plumbing (30 minutes)
- PROP1142: Back to Basics - Water Investigation (30 minutes)
- PROP1143: Positioning the Emergency Mitigation Repair Program (30 minutes)

- PROP1146: Back to Basics - Exteriors Course (30 minutes)
- PROP1148: Positioning the Flooring Options Program (30 minutes)
- PROP1149: Back to Basics Manufactured Home Estimating (30 minutes)
- PROP1153: Depreciation or Withholding of General Contractor Overhead and Profi (30 minutes)
- PROP1156: Back to Basics Brick Veneer (30 minutes)
- PROP2224: Beyond the Basics Theft (3 hours 15 minutes)
- SIU APD Hail Damage Presentation (15 minutes)
- SIU Boat Theft Fraud (10 minutes)
- SIU Catastrophe Claim Guide (10 minutes)
- SIU Catastrophe Fraud Training (20 mins)
- SIU Commercial Heavy Duty Equipment Fraud (10 minutes)
- SIU Customer Service and Fraud Investigation (1 hour)
- SIU Event Data Recorders (15 minutes)
- SIU How to Read and Auto Estimate (10 minutes)
- SIU ID Fraud Altered Stolen Vehicle (10 minutes)
- SIU Indicators of Boat Theft Fraud (10 minutes)
- SIU Injury Guide (15 minutes)
- SIU Investigative Legal Issues (30 mins)
- SIU Medical Web - Coding & Documentation (15 minutes)
- SIU Medical Web - Indicators in Emergency Care (15 minutes)
- SIU Motorcycle Theft Fraud (10 minutes)
- SIU Oil and Fuel Sample Collection Video,(10 minutes)
- SIU Pedestrian Staged Accidents Leaders Guide (10 minutes)
- SIU Property Claim Guide (10 minutes)
- SIU Property Fires Investigative Guide (10 minutes)
- SIU Roofing CRT (10 minutes)
- SIU Slip and Fall Leaders Guide (10 minutes)
- SIU Staged Accident Investigation Guide (10 minutes)
- SIU Statement Taking & Interviewing (1 hour)
- SIU Vehicle Collision Paint Comparison Video (10 minutes)
- SIU Vehicle Fire Investigative Guide, (10 minutes)
- SIU Vehicle Theft Investigative Guide (10 minutes)
- SIU Wind and Hail Damage - Mechanical vs. Actual (10 minutes)
- SIU Wind and Hail Damage Presentation (10 minutes)
- SIU1105: SIU Catastrophe Fraud Training (10 minutes)
- SIU1106: SIU Investigative Legal Issues (10 minutes)
- SIU1108: Social Media Investigations (10 minutes)
- Smoke and Ash Fraud Investigation (1 hour)
- Snapshot: Ankle Injuries (1 hour)
- Snapshot: Carpal Tunnel Syndrome (1 hour)
- Snapshot: Cervical Strain - Whiplash (1 hour)
- Snapshot: CPT Modifiers (1 hour)
- Snapshot: Diagnostic Testing (1 hour)
- Snapshot: Lumbar Strain (1 hour)
- Snapshot: Orthopedic Testing (1 hour)
- Snapshot: Schizophrenia (1 hour)
- Snapshot: Stress (1 hour)
- Snapshot: X-Ray CPT Code Abuse (1 hour)

- Social Media Investigation (30 minutes)
- Staged Auto Accidents (1 hour)
- Street Racing and Sport Compact Vehicle Fraud (1 hour)
- SUB1004: Subrogation Onboarding and Tip Sheet (45 minutes)
- The Knee (Commercial version) (3 hours)
- Thunderhead one updates (30 minutes)
- Total Loss/Salvage Course (1.5 hours)
- Trauma Coding (1 hour)
- Trigger Point Injections (1 hour)
- Understanding MedAWARE Alerts (1 hour)
- Using the Social Network for Investigation (1 hour)
- Vehicle Identification Numbers (1 hour)
- Vehicle Identification Points, (1 hour)
- Vehicle Repair Fraud (1 hour)
- Vessel Identification (1 hour)
- WC1000: Workers Compensation On Boarding (6 hours 25 minutes)
- Workers Compensation Fraud (1 hour)
- Earthquake Training (1 hour)
- PROP2211: Beyond the Basics - Water (3 hours)
- PROP2214: Beyond the Basics - Personal Property (30 minutes)
- PROP2215: Beyond the Basics - Winter Claims (30 minutes)
- PROP2220: Beyond the Basics Wind (1 hour 30 minutes)
- PROP2221: Beyond the Basics Hail (1 hour 15 minutes)
- PROP2224: Beyond the Basics Theft (3 hours, 15 minutes)
- PROP2225: Additional Living Expenses (45 minutes)
- PROP2230: Beyond the Basics - Fire (2 hours)
- PROP2230: Causes and Origin of fire (15 minutes)
- PROP2230: Fire and Smoke Damage (40 minutes)
- PROP2230: Framing (15 minutes)
- PROP2249: BYB Manufactured Home Estimating (30 minutes)
- PROP2700: Lumber and Wall Framing (1 hour)
- PROP2701: Floor Framing and Beams (1 hour)
- PROP2702: Sheathing, Floors, and Stairs (1 hour)
- PROP2704: Roof Framing (1 hour)
- PROP2705: Roof Rafters (1 hour)
- PROP2706: Roof Trusses (1 hour)
- PROP2707: Finishing the Roof & Sheathing (1 hour)
- PROP2709: Masonry & Stucco (1 hour)
- PROP2710: Siding (1 hour)
- PROP2711: Fascia & Gutters (1 hour)
- PROP2712: Flat Roofs (1 hour)
- PROP2713: Sloped Roofs (1 hour)
- PROP2714: Tile Shingles (1 hour)
- PROP2715: Electrical, Part 1 (1 hour)
- PROP2716: Electrical Part 2 (1 hour)
- PROP2717: Plumbing Part 1 (1 hour)
- PROP2720: Insulation (1 hour)
- PROP2721: Cabinet Quality and Woods (1 hour)
- PROP2722: Judging and Installing Cabinets & Countertops (1 hour)
- PROP2723: Finish Hardware, HVAC and Electrical (1 hour)

- Property and Casualty Insurance 101 (10 minutes)
- QA1001: Training Curriculum (5 hours 15 minutes)
- Recorded Statements (1 hour 45 minutes)
- Recruitment of Patients (1 hour)
- RGCAS1105: Recorded Statements for Regional Liability (45 minutes)
- RGCAS7114: Method of Inspection E-Learning (WBT) (15 minutes)
- RGCAS7152: Photo App E-Learning (25 minutes)
- RGCERT2112: Regional Claims Beyond the Basics in APD - Glass (15 minutes)
- RGEST1105: Estimating System Difference, (30 minutes)
- RGEST1113: Estimating Writing Checkpoint 1 (30 minutes)
- RGEST1116: Welded Panels Exercise (30 minutes)
- RGFTV2202: Fire Theft and Vandalism NICTA (3 hours)
- RGTL1114: Total Loss - Unrelated Prior Damage Exercise (30 minutes)
- RGTL1118: Field Clearing Note Exercise (5 minutes)
- ROR Letter Training (1 hour)
- RV Appraisals, (30 minutes)
- Scout: MCC and CCV Training (5 hours)
- Securing Personal Information on Mobile and Recordable Devices (30 mins)
- LEAD5114: Business Acumen Toolkit – Functional Areas and Operations (30 minutes)
- PROP1177: Proper Check Issuing and Escheating (1 hour)

COMPUTER SKILLS

- Advanced Data Analysis in Excel 2003 (3 hours)
- Advanced Data Management in Excel 2007 (2 hours)
- Claims System - Coverage System Navigation (30 minutes)
- Collaborative Features in Word 2007 (2 hours)
- Creating Basic Presentations using PowerPoint 2003 (3 hours)
- Creating Customized Publications with Publisher 2007 (3 hours)
- Customizing PowerPoint 2003 Presentations (2 hours)
- Excel 2003 Formulas and Functions (3 hours)
- Excel 2007 Charts, Pictures, Themes and Styles (2 hours)
- Excel 2007 Formulas and Functions (2 hours)
- eZsign (30 minutes)
- Formatting Data in Excel 2003 (2 hours)
- GEN5010: Excel for Supervisors (4/01/10), (30 minutes)
- Getting Started with PowerPoint 2007 (2 hours)
- HEART - Investigation View and Self Building Clean Webinar (2 hours)
- HEART Upgrade (15 minutes)
- HEART1155: OpenUI Overview and Training (30 minutes)
- Installing Apps/ Converge - CAT Corps (45 minutes)
- Introduction to Pure Exposure Value (30 minutes)
- Microsoft - Excel Essentials (2 hours)
- PROP1002: Enservio Basics (15 minutes)
- PROP1103: Enservio 7.0 (15 minutes)

- PROP1160: Enservio Screen Casts (multiple) (10 minutes)
- PROP1700: Plans and Measuring (1 hour)
- PROP1701: Calculating Quantities (1 hour)
- PROP1702: Roof Quantities (1 hour)
- PROP1703: Home Construction Overview(1 hour)
- PROP1704: Footings and Foundations, (1 hour)
- PROP1705: From the Floor to the Roof (1 hour)
- PROP1706: Home Building Methods (1 hour)
- PROP1708: Windows and Garage Doors (1 hour)
- PROP1709: Fences (1 hour)
- PROP1710: Common Roofing Materials (1 hour)
- PROP1711: Composition Shingles (1 hour)
- PROP1712: Wood Shingles (1 hour)
- PROP1713: Other Roof Coverings (1 hour)
- PROP1715: HVAC, Part 1 (1 hour)
- PROP1716: Walls and Ceiling Finishes (1 hour)
- PROP1717 Doors & Interior Trim (1 hour)
- PROP1718: Painting and Wallpaper (1 hour)
- PROP1719: Carpet and Tile (1 hour)
- PROP1720: Vinyl, Wood, and Other Floor Finishes (1 hour)
- PROP1721: Common Home Repair Issues (1 hour)
- PROP1722: Other Home Repair Issues (1 hour)
- PROP1723: Exterior Painting (1 hour)
- Setting up a Site and Adding Content in Dreamweaver CS4 (2 hours)
- SkillSoft - Adding Graphics to Presentations in PowerPoint 2007 (1 hour)
- SkillSoft - Adding Multimedia and Animations to Presentations in PowerPoint 2007 (1 hour)
- SkillSoft - Creating Custom Slide Shows in PowerPoint 2007 (1 hour)
- SkillSoft - Word 2010, Excel 2010, and the New Office 2010 Interface (1 hour)
- Using Visuals in PowerPoint 2003 Presentations (2 hours)
- HEART1005: HEART Basics (1 hour)

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



RETRAINEE - JOB CREATION

Training Proposal for:

HP Hood LLC

Agreement Number: ET18-0205

Panel Meeting of: May 24, 2018

ETP Regional Office: Sacramento

Analyst: J. Dongallo

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:	Sacramento	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Chauffeurs, Teamsters and Helpers Union Local No. 150		
Number of Employees in:	CA: 260	U.S.: 3,000	Worldwide: 3,000
Turnover Rate:	12%		
Managers/Supervisors: (% of total trainees)	11%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	-	(High Earner Reduction)	=	Total ETP Funding
\$183,760		\$0		\$0		\$183,760

In-Kind Contribution:	100% of Total ETP Funding Required	\$378,973
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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, PL-Mfg. Skills, OSHA 10	233	8-200	0	\$720	\$16.80
				Weighted Avg: 40			
2	Job Creation Priority Rate Retrainee	Business Skills, Computer Skills, Cont. Imp., HazMat, Mfg. Skills, PL-Mfg. Skills, OSHA 10	20	8-200	0	\$800	*\$14.00
				Weighted Avg: 40			

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

Minimum Wage by County: Job Number 1: \$16.80 per hour in Sacramento County.
 Job Number 2 (Job Creation): \$14.00 per hour in Sacramento County.
Health Benefits: Yes No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: Yes No Maybe
 Up to \$0.30 per hour may be used to meet the Post-Retention Wage in Job Number 1.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1 (Retrainee)		
Administration Staff		18
Lab Technician Staff		21
Managers		15
Quality Staff		4
Production Staff		126
Supervisors		13
Warehouse Staff		36
Job Number 2 (Job Creation)		
Production Staff		15
Warehouse Staff		5

INTRODUCTION

Founded in 1846 and located in Sacramento, HP Hood LLC (HP Hood)(<https://hood.com>) manufactures dairy products including milk, cheese and creams. HP Hood's brands and franchise products include Hood, Crowley Foods, Simply Smart, Heluva Good, Lactaid, Blue Diamond Almond Breeze, Baileys Coffee Creamers, and Heshey's Milk and Milkshakes. Customers include Safeway, Walmart, Raleys, Savemart, Nugget, Whole Foods and Target. HP Hood has three different production, distribution and service facilities in Sacramento county. All three locations will participate in training.

PROJECT DETAILS

This is HP Hood's first ETP Agreement. Training will help the Company improve efficiency, productivity, and maintain Good Manufacturing Practices standards. The Company will also provide training on new equipment, advanced production processes, standard operating procedures and Environmental Resource Planning (ERP) software.

HP Hood continues to upgrade processes and technology to keep pace with industry and customer demands. The Company has invested \$8.3M on new machinery, such as Reverse Osmosis Water Filtration systems and Boiler upgrades. Implementation of the new equipment is scheduled to be completed by the second quarter of 2018. This new machinery requires HP Hood to provide its workers with operational and process improvement skills training to be efficient and productive.

To standardize operating procedures and meet increasing market demands, HP Hood has created internal training programs for all occupations. Staff will receive select training in warehouse, production, quality/lab and administration.

In addition, the Company is in the process of upgrading its current ERP software. Training is needed to improve staff skills and efficiency related to the new software. The new ERP software will combine multiple systems, enabling employees to plan, schedule, and adjust business processes. Training will provide employees skills to navigate the system proficiently.

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.

HP Hood anticipates continuous industry growth within the next 12 months. To compliment this expected growth, the Company has invested \$8.3M on new machinery, such as Reverse Osmosis Water Filtration Systems and Boiler upgrades. HP Hood has committed to hiring 20 new Production, Warehouse and Administration Staff (Job Number 2) to support these equipment upgrades. The date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

Union Support

The Warehouse, Production, Quality, Lab Research and Administration Staff are represented by a local union: Chauffeurs, Teamsters and Helpers Union Local No. 150. A union letter of support has been submitted.

Training Plan

Training will be delivered via Class/Lab.

Business Skills: Training will be provided to all occupations in administrative efficiency will provide staff with the skills to operate the business effectively. Training topics include Communication Skills, Project Management and Product Knowledge.

Computer Skills: Training will be provided to all occupations and focus on new software and upgraded systems. Training will improve overall processes and productivity. Training topics include ERP software.

Continuous Improvement: Training will be provided to all occupations to enable employees to improve quality, productivity and food safety. Training topics include Quality Planning.

Hazardous Materials: Training will be provided to all occupations. Staff will receive the skills necessary to ensure a safe work environment while working with dangerous materials. Training topics include Ammonia Awareness, Chemical Safety and Hazardous Communication.

Management Skills: Training will be delivered to Managers and Supervisors. Training will focus on enhancing skills to create a productive work atmosphere to motivate and lead staff. Training topics include Leadership Skills and Contractor Management.

Manufacturing Skills: Training will be provided to Production, Warehouse, Quality and Lab Technician Staff. Trainees will gain the skills and knowledge to operate and maintain new and old production equipment to ensure product quality. Training topics include Basic Food Facility Defense, Carton Integrity, Critical Control Point, Safe Quality FoodStandards and Storm Water Pollution Prevention Plan.

Certified Safety Training

OSHA 10: This training is a series of courses “bundled” by industry sector and occupation. It consists of 10 hours of classroom for Production and Warehouse Staff.

Completion of the training results in a certificate that expands employment opportunities. To ensure that each trainee receives certification, ETP will only consider payment earned upon completion of the full 10-hour course. The coursework must be approved by Cal-OSHA, and the instructors may be certified by Cal-OSHA.

Productive Laboratory

Trainees may produce goods for profit as part of Productive Laboratory (PL) training in the courses identified under the Curriculum. The instructor must be dedicated to training delivery during all hours of training.

HP Hood will train all employees, except Administrative Staff, in PL-Manufacturing Skills. PL will allow employees to perform their duties efficiently while being able to take on additional duties of surrounding machines, if needed. This has been proven to increase efficiencies by lowering downtime. Production Staff will also receive hands-on training specific to the operation and maintenance of new equipment. PL training will supplement the courses listed in class/lab training.

Training will be under constant supervision with a 1:1 trainer-to-trainee ratio. Production is expected to be slowed during PL as the trainer will be stopping production to coach and mentor

the trainee. Also, the equipment will be operating at a slower speed until proficiency is gained. The trainer will determine the trainee's level of competency at the end of the training. PL training will be capped at 60 hours per trainee.

Commitment to Training

HP Hood has an annual training budget of approximately \$10,000 in state-mandated safety training, equipment maintenance and installation, food safety and security and sales training.

ETP funds will not displace the existing financial commitment to training. ETP funds will support the Company's ongoing financial commitment to training. At the completion of the ETP training, HP Hood will continue to provide its workforce the skillsets they need to develop and grow within the Company. Safety training is provided in accordance with all pertinent requirements under state and federal law.

Training Infrastructure

The Director of Operations and Senior Environmental Health & Safety Manager will oversee all aspects of training with staff at each location to help coordinate training. Additionally, the Company has retained the services of a third party administrator to oversee all administrative responsibilities, including enrollment, recording, tracking, scheduling training, securing ETP rosters, verify training and retention completion and ensure compliance with all ETP requirements.

Training will be provided by in-house experts and vendors as needed.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Economic Incentives Advisory Group (EIAG) in Phoenix, Arizona assisted with development for a flat fee of \$13,782.

ADMINISTRATIVE SERVICES

EIAG will also perform administrative services for a fee not to exceed 11.5% of payment earned.

ACTIVE PROJECTS

N/A

PRIOR PROJECTS

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

- Accounting Administration
- Accounts Payable
- Accounts Receivable
- Bill of Materials
- Communication Skills
- Customer Relations
- Equipment Solutions
- Inventory Control
- Master Data Records
- Material Resource Planning
- Merchandising
- Product Knowledge
- Production Planning
- Project Management
- Purchasing
- Quality Control
- Reporting
- Routings
- Sales Orders
- Shipping and Receiving

COMPUTER SKILLS

- Environmental Resource Planning Software
 - LogPro
 - SAP

CONTINUOUS IMPROVEMENT

- Quality Plan

HAZARDOUS MATERIALS

- Ammonia Awareness
- Chemical Safety
- Hazardous Communication

MANAGEMENT SKILLS (Managers/Supervisors only)

- Contractor Management
- Leadership Skills

MANUFACTURING SKILLS

- Aerial/Boom/Scissor Lift Training
- Basic Food Facility Defense
- Biosecurity Training
- Bulk Chemical Receiving Training

- Carton Integrity Training
- Clamp Training
- Confined Space Entry Training
- Critical Control Point Training
- Electrical Safety
- Equipment Upgrade Training
- Food Allergens
- Fork Lift Training
- Good Manufacturing Practices
- Hazard Analysis and Risk-based Preventive Controls Training
- Lab/Research Training
- Laser Equipment Training
- Product Heat Stress
- Respiratory Training
- Safe Quality Food Standards
- Sanitation Boot Camp
- Spill Prevention, Control and Counter Measures
- Storm Water Pollution Prevention Plan
- Traceability

OSHA 10 (Certified OSHA Instructor)

- OSHA 10 (requires 10 hours completion)

Productive Lab Hours

- 0-60 **MANUFACTURING SKILLS** (1:1 ratio)
- Aerial/Boom/Scissor Lift Training
 - Bulk Chemical Receiving Training
 - Carton Integrity Training
 - Fork Lift Training
 - Hearing Equipment
 - Lab/Research Training
 - Sanitation Boot Camp

Safety Training will be limited to 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.



CHAUFFEURS, TEAMSTERS AND HELPERS

LOCAL NO. 150

7120 EAST PARKWAY - SACRAMENTO, CALIFORNIA 95823
TELEPHONE (916) 392-7070 FAX 392-7675



AFFILIATED WITH THE INTERNATIONAL BROTHERHOOD OF TEAMSTERS

February 27, 2018

California Employment Training Panel
1100 J Street, Suite 400
Sacramento, CA 95814

Dear Members of the Panel:

Teamsters Local 150 submits this letter in support of HP Hood LLC'S Employment Training Panel (EPT) Single Employer Application Ref. 18-0216, to the State of California Economic Development Unit.

The Teamsters are known as the champion of freight and warehouse workers, but have organized workers in virtually every occupation imaginable, both professional and non-professional, private sector and public sector. There are nearly 1,900 Teamster Affiliates throughout the United States, Canada and Puerto Rico.

Teamster contracts are the guarantors of decent wages, fair promotion, health coverage, job security, paid time-off and retirement income. The Teamsters Union also performs vital tasks in such areas as pension management, safety & health, community outreach, governmental affairs and communications. For more than a century, the Teamsters have been a public voice for the rights and aspirations of working men and women and a key player in securing them.

Teamsters Local 150 recognizes that our support of HP Hood's ETP training plan and contract will help further our joint mission to provide skill development, continued training, and opportunities for advancement, for workers/members.

On behalf of Teamsters Local 150, I ask that HP Hood's application be given earnest consideration. Should the ETP staff have any questions, they should not hesitate to contact me at 916-392-7070 ext. 39.

Sincerely,

A handwritten signature in black ink that reads "Ed Rogers".

Business Representative



Training Proposal for:
Ingomar Packing Company, LLC
Agreement Number: ET18-0231

Panel Meeting of: May 24, 2018

ETP Regional Office: Sacramento

Analyst: K. Mam

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate HUA Seasonal	Industry Sector(s):	Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Merced	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: 150	U.S.: 150	Worldwide: 150
<u>Turnover Rate:</u>	3%		
<u>Managers/Supervisors:</u> (% of total trainees)	6%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$215,280		\$0	\$0		\$215,280

In-Kind Contribution:	100% of Total ETP Funding Required	\$238,300
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate HUA	Business Skills, Computer Skills, Cont Imprv, Mfg. Skills, PL-Mfg .Skills	140	8-200	0-20	\$612	\$12.53*
				Weighted Avg: 34			
2	Retrainee Priority Rate HUA Seasonal	Business Skills, Computer Skills, Cont. Imprv., Mfg. Skills, PL-Mfg. Skills	300	8-200	0-20	\$432	\$12.53*
				Weighted Avg: 24			

* 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 & 2 (HUA): \$12.53 per hour for Merced 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 \$1.53 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 (Retrainees)		
Administrative/Support Staff		25
Marketing/Sales Staff		10
Production/Operation Staff		8
Technician/Mechanic		67
IT/Engineer		5
Supervisor/Manager		25
Job Number 2 (Seasonal)		
Production/Operation Staff		300

INTRODUCTION

Founded in 1983 and headquartered in Los Banos, Ingomar Packing Company, LLC (Ingomar) (www.ingomarpacking.com/) manufactures industrial tomato products such as tomato paste and diced tomatoes. Ingomar supplies tomato products to companies such as Heinz, Campbell Soup, Barilla, and Del Rosino. Training will be provided at the Company’s two facilities in Los Banos.

PROJECT DETAILS

This is Ingomar's second ETP Agreement, and the first in the last five years. The Company recently invested over \$350K in new equipment and software such as a Split Flume System, Pomace Auger, Paylocity, and AMMS Maintenance Management System. Staff will be cross-trained on operations and maintenance of new equipment including inspection, calibration, repair, testing, adjustment and installation. Staff will also be trained on the Company's new payroll system, Paylocity, and purchasing system, AMMS Maintenance Management System, which will allow the Company to streamline processes. Training under this proposal will allow the Company to train staff to use and maintain software and equipment properly.

Also, due to ever changing strict quality standards, Ingomar has implemented a "custom-pack" program where production is managed to meet customers' individual requirements. This requires more process changes, greater field of management, and production flexibility. Staff must be trained to ensure customers receive the attention and service required to keep the Company's products in demand and ensure quality and customer satisfaction is met.

Training Plan

Training will be delivered via classroom/laboratory, E-Learning, Computer-Based Training (CBT) and Productive Lab 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 focus on expanding customer service skills. Training topics include Customer Service (CSI), Client Communication Skills, and Business Development/Marketing.

Computer Skills: Training will be offered to Supervisors/Managers, IT/Engineers, and Administrative/Support Staff. Training will focus on the Company's new payroll system and software applications. Training topics include HRIS (Paylocity), AMMS – Maintenance Management System, and Canopy System.

Continuous Improvement: Training will be offered to all occupations. Training will focus on improving product quality, identifying and resolving production issues, and reducing waste. Training topics include Efficiency/Quality Improvements, High Performance Work-Teams (HPWT), and Problem Solving/Process Improvement/Process Innovation.

Manufacturing Skills: Training will be offered to Production/Operation Staff, Technicians/Mechanics, and Supervisors/Managers. Training will focus on maintenance and repair skills related to new and current equipment. Training topics include Manufacturing Process Instruction (MPI), Ingomar Manufacturing Techniques (IMT), and Warehouse & Inventory Processes.

Productive Laboratory

Trainees may produce goods for profit as part of the PL training in the courses identified under the Curriculum. The instructor must be dedicated to training delivery during all hours of training, and special attendance rosters will be used to assist in monitoring.

Due to the nature of Ingomar's services, certain training cannot be replicated in a class/lab environment. PL training will allow practical, hands-on experience in a working environment to develop the skillsets for trainees to be certified to operate new manufacturing processes on the production line. Ingomar utilizes PL training to deliver critical manufacturing skills to frontline manufacturing workers.

Ingomar is requesting PL training for their Production/Operation Staff and Technicians/Mechanics. Equipment to be used during PL includes Boilers, Split Flume Systems, Pomace Auger, and Hydraulic Equipment.

Training will be delivered by subject-matter experts with demonstrated knowledge and expertise in the field. Instructors will monitor trainee competencies before the trainee is deemed competent. PL trainees will receive up to 60 hours per trainee at a 1:1 ratio.

Computer-Based Training

CBT will be provided to supplement class/lab Trainees (Job Numbers 1 and 2) will receive between 0-20 hours of CBT.

Commitment to Training

ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law. The Company invests \$53,000 annually per facility for training that includes introductory computer skills, safety skills, company policies and procedures, and new hire orientation.

➤ Training Infrastructure

Ingomar has a detailed training plan in place. The Company's HR Department will coordinate with Supervisors to oversee all training efforts and to ensure recordkeeping requirements are met. Staff will be in place at each facility to coordinate training. Additionally, the Company has engaged the services of a third-party administrator with extensive ETP administration experience to work close with staff to complete the project successfully.

Retention Modification - Seasonal

Under the Seasonal Worker program, in recognition of the cyclical nature of crop production, the trainees in Job Number 2 qualify for a modified retention period of no less than 500 hours within 12 months of the end-of-training. Ingomar requests this retention modification for these trainees.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

California Training Administration in Rocklin assisted in the development of this proposal for a flat fee of \$3,500.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum**Class/Lab and E-Learning Hours**

8-200 Trainees may receive any of the following:

BUSINESS SKILLS

- + Business Development/Marketing
- + Client Communication Skills
- + Customer Service (CSI)
- + Effective Presentations
- + Finance/Accounting Processes
- + Ingomar Product Training
- + Negotiation Skills/Professionalism
- + Project Management
- + Strategic Implementation/Strategic Planning
- + Supply Chain Improvements
- + Support Skills (Customer, Supplier, Sales)

COMPUTER SKILLS

- + AMMS – Maintenance Management System
- + Canopy System
- + DCS – Document Control System
- + HRIS (Paylocity)
- + Microsoft Tools (Word, Excel, PowerPoint – Int. & Adv. Only)
- + Social Media Tools for Marketing & Sales

CONTINUOUS IMPROVEMENT

- + Business Etiquette
- + Coaching Effective Teams
- + Customer Communications (Internal/External)
- + Effective Communications
- + Efficiency/Quality Improvements
- + GMP – Good Manufacturing Practices
- + High Performance Work-Teams (HPWT)
- + Managing Multiple Priorities/Time Sensitive Deadlines
- + New Lead/Supervisor Techniques
- + Problem Solving/Process Improvement/Process Innovation
- + Project Management Skills
- + Quality Techniques/Lean Quality Improvements
- + Situational Leadership
 - o Advanced Communication Skills
 - o Coaching/Motivating Others to Excellence
 - o Handling Difficult Situations
 - o Improving Job Performance
 - o Managing & Leading Change
 - o Motivating Employees in the Work Place
 - o Train the Trainer
- + SPC/ISO
- + Team Building/Team Meetings/Work Group Objective

MANUFACTURING SKILLS

- ✦ Calibration, Repair, Testing
- ✦ CIP (Clean in Place) Procedures and Standards
- ✦ Clarification: Critical Scrap Investigation (CSI)
- ✦ Cleanroom/Sterile Equipment
- ✦ Handling Hazardous Materials
- ✦ Industrial Electronics
- ✦ Ingomar Manufacturing Techniques (IMT)
- ✦ Job Skills Update/Work Instruction (WI)
- ✦ Maintenance/Installation
- ✦ Manufacturing Process Instruction
 - ✦ Boilers, Control Room, Hydraulic Equipment
 - ✦ Manufacturing Process Instruction (MPI) Bins, Drums, Pallets
 - ✦ Pomace Auger
 - ✦ Split Flume System
- ✦ Mathematical Calculations
- ✦ Read and Interpret Documents
- ✦ Shipping/Receiving Techniques
- ✦ Shop Floor Hazards and Protection
- ✦ Tomato Truck Operation
- ✦ Vacuum Theory/Vacuum Equipment
- ✦ Warehouse & Inventory Processes

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

Productive Lab Hours

0-60

MANUFACTURING SKILLS (1:1)

- ✦ Manufacturing Process Instruction (MPI)
 - ✦ Equipment Certification
 - ✦ Equipment Maintenance
 - ✦ Material Handling/Waste Disposal
 - ✦ Operating Production Equipment
 - ✦ Testing/Troubleshooting
 - ✦ Warehouse Inventory Procedures

CBT Hours

0-20

COMPUTER SKILLS

- ✦ Advanced Customization in Excel 2007 (2 hours)
- ✦ Advanced Data Management in Excel 2007 (1.5 hours)
- ✦ Advanced Formatting in Excel (2 hours)
- ✦ Advanced Formatting in Excel 2007 (2 hours)
- ✦ Analyzing Data in Excel 2007 (3.5 hours)
- ✦ Excel 2007 Charts, Pictures, Themes, and Styles (1.5 hours)
- ✦ Excel 2007 Formulas and Functions (2 hours)
- ✦ Excel Formulas and Functions (2 hours)
- ✦ Exchanging Data with Excel 2007 (3 hours)
- ✦ Manipulating and Formatting Data and Worksheets in Excel 2007 (3 hours)
- ✦ Protecting and Sharing Excel 2007 Workbooks (2 hours)

- ✚ Protecting and Sharing Excel workbooks (2 hours)

CONTINUOUS IMPROVEMENT

- ✚ Communication Skills
 - Interpersonal Communication: Being Approachable (1 hour)
 - Interpersonal Communication: Communication Assertively (1 hour)
 - Interpersonal Communication: Communicating with Confidence (1 hour)
 - Interpersonal Communication: Listening Essentials (1 hour)
 - Interpersonal Communication: Targeting Your Message (1 hour)
- ✚ Competitive Awareness and Strategy (0.25 hours)
- ✚ Leadership Skills
 - Leading Innovation (1.5 hour)
 - Leading with Emotional Intelligence (1.5 hour)
 - Managing Projects within Organization (2 hours)
 - Motivating Employees (1.5 hour)
- ✚ Project Management Skills
 - Project Management Overview (1.5 hours)
 - Basic Projects within Organizations (1.5 hours)
 - Customer Service: Confrontation and Conflict (1 hour)
 - Customer Service: Building Rapport in Customer Relationships (1 hour)
- ✚ Project Planning & Lifecycles (2 hours)
- ✚ Project Scheduling (3 hours)
- ✚ Total Quality Management (1.5 hours)

MANUFACTURING SKILLS

- ✚ New Production Processes (3 hours)
- ✚ New Product Implementation and Production (3 hours)
- ✚ Inventory Management (3 hours)
- ✚ Supply Chain Management (2 hours)
- ✚ Logistics Management (3.5 hours)

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



Training Proposal for:

Kagome Inc.

Agreement Number: ET18-0209

Panel Meeting of: May 24, 2018

ETP Regional Office: Sacramento

Analyst: J. Dongallo

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate HUA	Industry Sector(s):	Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Merced, San Mateo	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: 183	U.S.:333	Worldwide: 2456
<u>Turnover Rate:</u>	15%		
<u>Managers/Supervisors:</u> (% of total trainees)	12%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$247,680		\$0	\$0		\$247,680

In-Kind Contribution:	100% of Total ETP Funding Required	\$323,780
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate HUA	Business Skills, Computer Skills, Continuous Impr, HazMat, Management Skills, Mfg Skills, PL-Mfg Skills	158	8-200	0-66	\$1,440	\$12.53*
				Weighted Avg: 80			
2	Retrainee Priority Rate	Business Skills, Computer Skills, Continuous Impr, HazMat, Management Skills, Mfg Skills, PL-Mfg Skills	14	8-200	0-66	\$1,440	\$18.22
				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: \$12.53 per hour in Merced County and \$18.22 per hour in San Mateo County.

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

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

Job Number 1: up to \$1.03 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: Merced County (Retrainee/HUA)		
Administration Staff		9
Consumer Insights & Innovation Staff		1
Logistics Staff		14
Operations Staff		87
Maintenance Staff		13
Quality Control Staff		14
Supervisors/Managers		20
Job Number 2: San Mateo County (Retrainee)		
Consumer Insights & Innovation Staff		10
Sales Staff		3
Supervisors/Managers		1

INTRODUCTION

Founded in 1899 and headquartered in Los Banos, Kagome Inc. (Kagome) (www.kagomeusa.com) is a large manufacturer of natural vegetable and fruit sauces, salsas, spreads, and dessert icings used in many major retail stores and restaurants. Kagome's customers include Panda Express, Subway, Dominos, Costco, Sam's Club, Taco Bell, Kentucky Fried Chicken (KFC), Chili's, Applebees, and many local retailers throughout California. Kagome has production, distribution and service locations in Merced and San Mateo Counties. Both locations will participate in training under this proposal. This is Kagome's first ETP agreement.

PROJECT DETAILS

Kagome needs to improve efficiency and productivity, maintain Good Manufacturing Practices (GMP) standards, and stay abreast with changing industry regulations to keep pace with industry and customer demands. For this, the Company has created internal training programs to standardize operating procedures.

Kagome will also provide training on new equipment and Environmental Resource Planning (ERP) software. The Company has invested \$10M on new machinery, such as Hydrocooler, Robotic Packing Systems and Forklift Sensor equipment upgrades. Implementation of the new equipment began in 2017 and is now fully operational. Training will provide operational and process improvement skills training necessary to be efficient and productive. In addition, the Company is implementing a new customized SAP ERP software. Training will be needed to improve staff skills and efficiency related to the new software. The incorporation of the new ERP software will combine multiple systems, enabling employees to plan, schedule, and adjust business processes into one system. Training will provide employees skills to navigate the system and proficiently perform their job duties.

Training Plan

Training will be delivered by in-house subject-matter experts and potentially, training vendors via Class/Lab, E-Learning, Computer-Based Training and Productive Lab.

Business Skills: Training will be offered to all occupations. Training will promote administrative efficiency and provide staff with the knowledge and skills to run the business effectively.

Computer Skills: Training will be offered to Administration, Consumer Insights & Innovations, Logistics, Sales, and Quality Control Staff. Training will focus on new software and upgraded systems to improve overall processes and productivity.

Continuous Improvement: Training will be provided to all occupations. Training will enable employees to improve quality, productivity and food safety.

Hazardous Materials: Training will be offered to all occupations. Staff will receive the skills necessary to ensure a safe work environment while working with dangerous materials.

Management Skills: Training will be delivered to Managers and Supervisors. Training will focus on enhancing skills to create a productive work atmosphere to motivate, positively lead, and coach staff.

Manufacturing Skills: Training will be provided to all occupations. Trainees will gain skills and knowledge to operate and maintain new and old production equipment to ensure product quality.

Productive Laboratory

Trainees may produce goods for profit as part of PL training in the courses identified under the Curriculum. Kagome will train all employees, except Administrative Staff, in PL in Manufacturing Skills. PL will allow employees to perform their duties efficiently while being able to take on

additional duties of surrounding machines, if needed. This has been proven to increase efficiencies by lowering any downtime. Production Staff will also receive hands-on training that is specific to the operation and maintenance of new equipment. PL will supplement Class/Lab training.

The instructor will be present at all times. Production is expected to be slowed during PL as the trainer will be stopping production to coach and mentor the trainee. Also, the equipment will be operating at a slower speed until proficiency is gained. The trainer will determine the trainee's level of competency at the end of the training. Up to 60 hours of training will be provided at a 1:1 trainer-to-trainee ratio.

Computer-Based Training

Computer-based training (CBT) will be provided to reinforce Class/Lab training provided in Hazardous Materials, Management Skills and Manufacturing Skills, as outlined in the Curriculum.

Commitment to Training

Kagome has an annual training budget of approximately \$60,000 for both Merced and San Mateo training facilities. The training budget includes state-mandated safety training, equipment maintenance and installation, food safety and security, and sales training.

ETP funds will not displace the Company's existing financial commitment to training. ETP funds will support the Company's ongoing financial commitment to training. At the completion of the ETP training, the Company will continue to provide employees with skills they need to develop and grow within the Company. Safety training is provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

The Vice President of Human Resources and Safety Manager will oversee all aspects of training, and there will be staff at each location to help coordinate training. An additional HR representative will be responsible for reports and internal data collection for tracking purposes. A team of 9 high-level subject-matter experts and 10 Supervisors/Managers will deliver training. Additionally, the Company has retained the services of a third-party administrator to oversee all administrative responsibilities including enrollment, recording, tracking, scheduling training, securing ETP rosters, verifying training and retention completion and ensuring compliance with all ETP requirements. While training hours may be ambitious, Kagome intends to provide weekly training to employees. The Company has a detailed training plan in place and is ready to begin training upon Panel approval.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Kagome retained Economic Incentives Advisory Group (EIAG) in Phoenix, Arizona to assist with the development of this proposal for a flat fee of \$12,500.

ADMINISTRATIVE SERVICES

EIAG will also perform administrative services in connection with this proposal for a fee not to exceed 11.5% 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

- Account Management
- Communication Skills
- Customer Service
- Leaderships
- Product Knowledge
- Resolving Conflicts
- Sales
- Workforce Development
- Train-the-Trainer
- Working in Teams

COMPUTER SKILLS

- HR Software System – Paylocity and HR360
 - Accounting
 - Inventory Control
 - Material Resource Planning
 - Payroll
 - Personnel
 - Purchase Order Tracking
- SAP ERP

CONTINUOUS IMPROVEMENT SKILLS

- Best Practices
- Leadership Skills
- Process Improvement
- Production Operations Workflow
- Production Scheduling
- Strategic Planning

HAZARDOUS MATERIAL SKILLS

- Ammonia Training
- Hazard Analysis and Critical Control Points
- Hazardous Communication
- Sanitation & Chemical Handling

MANAGEMENT SKILLS *(Managers and Supervisors only)*

- Building Organizational Capacity
- Coaching Skills and Teambuilding
- Decision Making
- Developmental Planning
- Key Management and Leadership Skills
- Motivation

MANUFACTURING SKILL

- Aerial Lift/ Boom Lift/ Scissor Lift
- Ammonia Refrigeration
- Automation Equipment
- Basic Food Facility Defense
- Check Weighing
- Clean In Place/Clean Out Place Processes
- Compressed Air Use
- Conveyors
- Effective Pest Control
- Equipment Operation, Maintenance & Troubleshooting
- Food Allergens
- Food Safety Modernization Act
- Food Safety Standards
- Fork Lift
- Glass and Hard Plastic Handling Procedure
- Good Laboratory Practices
- Good Manufacturing Practices
- Hazard Analysis and Critical Control Points
- Hearing Protection
- Housekeeping
- Ingredient Inventory Management
- Labeling Systems
- Material Handling/Shipping
- Metal Detection & Monitoring
- Minor Ingredients Training
- Mixer Training
- New Equipment Line
 - Hydrocooler
 - Robotic Packing
- Operator Training
- Pallet Turn Table Review
- Raw Ingredient Use Recording
- Safe Quality Foods
- Safety Data Sheets Training
- Scaler Raw Materials Training
- Welding/Cutting/Brazing

E-Learning Hours

8-200

COMPUTER SKILLS

- HR Software System – Paylocity and HR360
 - Accounting
 - Inventory Control
 - Material Resource Planning
 - Payroll
 - Personnel
 - Purchase Order Tracking

Productive Lab Hours

0-60

MANUFACTURING SKILLS (1:1 ratio)

- Aerial / Boom/ Scissor Lift Training
- Ammonia Refrigeration
- Automation Equipment
- Bostwick
- CCP PH and Water Activity Testing
- CCP Check Time & Temp Testing
- Check Weighing
- Clean in Place/ Clean Out of Place Processes
- Compressed Air Use
- Conveyors
- Dismantling Bins
- Documenting Re-Work
- Equipment Operation, Maintenance & Troubleshooting
- Food Safety Modernization Act
- Fork Lift
- Glass and Hard Plastic Handling
- Good Laboratory Practices
- Loading and Unloading Trucks
- Lock Out – Tag Out
- Metal Detection & Monitoring
- Minor Ingredients Training
- Mixer Training
- New Equipment Training
 - Hydrocooler
 - Robotic Packing
- Operator Skill Improvement
- Operator Training
- Operator Trouble Shooting
- Radio Communication
- Raw Ingredient Use Recording
- Safety Data Sheets
- Seam Test
- Scaler Raw Materials Training
- Thermometer Calibration
- Transportation Pillows
- Welding/Cutting/Brazing

CBT Hours

0-66

HAZARDOUS MATERIALS SKILLS

- Ammonia Accident Prevention – 0.5 hours
- Ammonia First Aid – 0.5 hours
- Hazard Analysis and Critical Control Points – 0.5 hours
- Hazardous Communication – 0.5 hours
- Sanitation and Chemical Handling – 2 hours

MANAGEMENT SKILLS

- Food Defense and Management – 2 hours

MANUFACTURING SKILLS

- Basic Food Facility Defense – 0.5 hours
- Food Safety Modernization Act – 0.5 hours
- Good Manufacturing Practices – 0.5 hours
- Handling Food Allergens – 0.5 hours
- HACCP History and Overview – 1 hour
- Hour - Introduction to Microbiology – 1 hour
- HACCP Principle 1: Conduct a Hazard Analysis – 1 hour
- First 6 Steps to Developing a HACCP Plan – 1 hour
- HACCP Principle 2: Identify CCPs in the Process – 1 hour
- HACCP Principle 3: Identify Critical Limits – 1 hour
- HACCP Principle 4: Monitoring – 1 hour
- HACCP Principle 5 Corrective Actions – 1 hour
- HACCP Principle 6: Verification – 1 hour
- HACCP Principle 7: Record Keeping – 1 hour
- Implementing and Maintaining the HACCP Plan and System – 1 hour
- HACCP Review – 1 hour
- HACCP Continuous Improvement – 2 hours
- Intro to Food Allergens (Refresher) – 0.5 hours
- Intro to Food Safety Standards and Safe Quality Foods – 0.5 hours
- Safety Data Sheets – 0.5 hours

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

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



Training Proposal for:
Karl Storz Endoscopy-America, Inc.
Agreement Number: ET18-0232

Panel Meeting of: May 24, 2018

ETP Regional Office: North Hollywood

Analyst: M. Niquet

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee	Industry Sector(s):	Manufacturing Wholesale Trade Healthcare Services Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles, Santa Barbara	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: 724	U.S.: 2,229	Worldwide: 7,650
<u>Turnover Rate:</u>	8%		
<u>Managers/Supervisors:</u> (% of total trainees)	13%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$234,576		\$0	\$0		\$234,576

In-Kind Contribution:	100% of Total ETP Funding Required	\$240,000
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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., HazMat, Mgmt. Skills, Mfg. Skills, Advanced Tech	724	8-200	0-100	\$324	\$16.70
				Weighted Avg: 18			

Minimum Wage by County: \$17.54 for Los Angeles and \$16.70 for Santa Barbara Counties.

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

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Accounting/Tax/Finance		43
Sr. Accounting/Tax/Finance		16
Customer Support		46
Sr. Customer Support		4
Engineer/Developer/Programmer/Technician		8
Human Resources		9
Sr. Human Resources		2
Marketing		17
Sr. Marketing		16
Operations/Office Support		43
Sr. Operations/Office Support		26
Professional/ Business		33
Sr. Professional Business		16
Sales Representatives		49
Sr. Sales Representatives		13
Crafts/Operatives/Technicians		101
Designer		10
Engineer		55

Senior Engineer		47
Jr. Management		9
Management I		33
Manager II		31
Senior Manager I		7
Senior Manager II		16
Professionals I		27
Professionals II		16
Sales/Marketing		2
Support Staff		29

INTRODUCTION

Founded in 1971 and headquartered in El Segundo, Karl Storz Endoscopy- America, Inc. (KSEA) distributes all U.S. endoscopes, instruments, imaging systems, electromechanical devices and OR1@integration. KSEA provides minimally invasive solutions for all surgical specialties. KSEA engages in the design, engineering, manufacture, marketing, and distribution of endoscopic equipment in the United States. The Company also offers instruments, medical video imaging systems, electromechanical devices, and OR1 integration products. In addition, the Company markets orthopedic and sports medicine products.

KSEA will hold the contract, and serve as the lead employer for its two affiliates located in Goleta:

KARL STORZ Veterinary Endoscopy-America, Inc. (“KSVEA”) develops endoscopy products and video imaging systems for use in veterinary practice offering a wide range of endoscopes, video cameras and accessories.

Karl Storz Imaging (KSI) designs and manufactures video imaging systems for the medical industry. It offers digital imaging systems for use in urology, ENT, gynecology, general surgery, and arthroscopy, as well as in invasive surgery, research and surgical microscopy, and industrial inspection.

PROJECT DETAILS

This will be KSEA’s second ETP project, and the second in five years. Previous training focused on KSEA’s quality philosophy principle functions. This new proposal consists of new courses and some topics repeated from the previous agreements that were not fully covered in the training project. There will be no duplication of training.

The North America Service Management Project (NASM) will standardize and streamline the Service Process across North American Companies utilizing all the enhanced functionality offered by SAP CRM. NASM uses the SAP CRM module, which is Mobile accessible. Field personnel will be able to create Service Requests, check status of service orders, and view evaluation results all from their mobile devices. SAP CRM is also highly customizable, so the Company will be able to create a User Interface exactly tailored to their needs.

The training plan for NASM spans two years and will affect almost every California employee at the Company and its affiliates.

Two dedicated task forces have thoroughly assessed training needs. A gap analysis identified a matrix of different weaknesses in the current training plan, and customized trainings are tailored to address those needs. More training will be scheduled upon approval of this project.

There are also new software and systems being implemented company-wide, necessitating staff training. New software and systems include GUARDIAN and Esprit. GUARDIAN is an integrated Contract Management System that will provide a platform to manage contracts and prepare KARL STORZ to support the future demands as customers work to drive down costs. Esprit is a powerful CAM system to handle the complex programming that factors into the mill-turn equation.

Training Plan

Training will be delivered via class/lab and Computer-Based Training (CBT) in the following:

Business Skills: Training will be offered to all occupations. Training is designed to provide better ways to identify customer needs, solve problems, learn about new products and improve service delivery.

Commercial Skills: Training will be offered to Professionals, Sales Representatives and Marketing Staff. Training will provide industry and product specific knowledge and help the staff properly convey the need of the specific products/tools to the customers.

Computer Skills: Training will be offered to all occupations. Training will help employees become proficient in navigating/working in the Company's internal systems and provide general computer skills necessary to perform their job functions and learn improved/upgraded platforms.

Continuous Improvement: Training will be offered to all occupations to ensure employees are maintaining the necessary skills to perform their job functions effectively. Courses will equip trainees proficiency in serving customers, and familiarize them with systems applications, policies, procedures, and departmental guidelines. Courses include Process Control, Problem Solving, Teambuilding, Quality Concepts, Process Improvement and Strategic Planning.

Hazardous Material: Training will be offered to Operations Staff and Technicians in how to handle hazardous materials and chemicals, and the correct way to clean and dispose of such materials. Training will provide supplemental hazardous materials skills to staff in techniques for handling hazardous materials and toxic substances associated with the KSEA's manufacturing processes.

Management Skills: Training will be offered to Managers. Training includes leadership, decision making, motivation, administration and teambuilding. These courses will help facilitate a better working environment, decreased turnover, and increased employee satisfaction.

Manufacturing Skills: Training will be offered to Technicians, Operations and Sales Staff in product creation and/or assembly. Employees will be trained to operate machinery, equipment operation, and other specific procedures to improve processes. Cross-training in various equipment will be given to a select Sales and Marketing Staff functions as the manufacturing process may be essential in differentiating certain products in the marketplace.

Advanced Technology

Advanced Technology (AT) will be offered to Professional and Management Staff (software programmers and quality engineers) and includes advanced training for small groups of advanced engineering staff working on special tasks, such as programming the Esprit Software and

Software Development. These occupations are the most specialized and are highly technical. KSEA strives to be ahead of the competition when it comes to technology, and the technical training is an integral part of this goal. The trainer-to-trainee ratio is 1:10 for AT, to allow in-depth coverage and personal attention from the instructor.

Computer-Based Training

CBT training will be provided to reinforce Class/Lab training provided in Business, Commercial, Computer, Continuous Improvement, Hazardous Materials and Manufacturing Sales Representatives/Field Representatives, Sr. Sales Representatives/Field Representatives, Marketing, Sr. Marketing, and Sales and Marketing Management will receive approximately 160 hours of CBT. This training works well for employees who travel frequently and juggle various projects. While these trainees will also receive class/lab, the majority of their training will be CBT.

CBT courses are developed internally to capture frequent program and software updates, and facilitate smooth training roll-outs. As such, CBT increases both productivity and learning for KSEA trainees. This model accounts for limited-time schedules, quick and effective skills improvements, by allowing trainees to access mandatory training when it's needed at a convenient time and location.

Commitment to Training

KSEA's annual California training budget is approximately \$1,130,000. Training includes basic job skills training, new employee orientation, diversity, performance management, anti-harassment, extensive on-the-job training, and introductory computer skills. ETP funds will not displace the existing financial commitment to training.

➤ Training Infrastructure

Training is scheduled to begin upon Panel Approval. KSEA has retained a third party administrator to ensure training adheres to ETP requirements, and to assist with enrollment, data tracking and invoicing. KSEAs Account Analyst will oversee project administration and coordinate with a team of 13 staff within the three locations (supervisors, managers and leads) who will work with the third party administrator. Training will take place at the Company's multiple facilities in El Segundo and Goleta by in-house experts and training vendors as needed.

Impact/Outcome

Training will promote professional development and provide staff with necessary job skills. With the growing number of products being introduced by the Company, it is imperative that employees are continuously educated about the needs of customers and the changing environment that requires the company's products.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0123	El Segundo	08/03/15- 08/02/17	\$508,848	\$237,602 (47%)

Low performance was due to over estimation of training hours and administrative difficulties with utilizing rosters, and lack of fulltime oversight of training progress.

For this current proposal, KSEA has designated staff to oversee training full time. This employee will be in constant communication with all internal groups to ensure 100% compliance. Also, KSEA conducted a thorough assessment of training needs in each department and is confident the hours requested are adequate and manageable. From its prior ETP experience, the Company has gained valuable experience and there is a clear understanding of ETP roster requirements. This proposed project has been right-sized to the Company's prior earnings.

DEVELOPMENT SERVICES

HCVT, in Irvine, assisted with development for a flat fee of \$10,000.

ADMINISTRATIVE SERVICES

HCVT 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

- Anatomy of the Sales Representative
- Business Writing
- Communication
- Correction of Problems
- Crucial Conversations
- Customer First
- Customer Service Skill Building
- Power Messaging
- Selling Skills

COMMERCIAL SKILLS

- Airway Management
- Certified Medical Professional
- Clinical Skills Urology Scrub Up Workshop
- Endoscopy Fundamentals
- Gynecology
- Head and Neck
- Product Knowledge
- Surgical Specialties

COMPUTER SKILLS

- DoD Information Assurance Certification and Accreditation Change Control Process
- Guardian
- Information Assurance Field Installation and Support Policies and Procedures
- Information Assurance Vulnerability Management SOP
- IT Applications
- IT Service Desk Training
- MS Office (Intermediate/Advanced)
- MS Project Server
- Power Pivot and Microsoft
- Preboot Execution Environment Image Load
- Retina Scanning
- SAP Navigation
- Security Content Automation Protocol
- Silver Image Creation
- Stand Alone Disk Image Load
- Video Integration

CONTINUOUS IMPROVEMENT

- Accountability
- American Management Association Management Training
- Conflict Management

- CS-Skill Building
- Customer Service Policies and Procedures Advance
- Customer Service Policies and Procedures Basic
- Development Planning
- Efficiency/Productivity
- Intellectual Property
- Internal Processes
- International Project Management Association Training
- Internet Process Communication
- Kaizen
- Karl Storz University Conflict Management Mentor Program
- Kronos
- Learning Space System Administrator Training
- North America Service Management Training
- Policies & Procedures
- Process Improvement
- Product Integration
- Professional in Human Resources Course
- Project Management
- Quality Concepts
- Strategic Planning
- Teambuilding

HAZARDOUS MATERIALS

- Disposable Spills

MANAGEMENT SKILLS (Managers/Supervisors Only)

- Accelerated Leadership Program
- Change Management
- Director Leadership Program
- Front Line Manager Training
- High Performers
- Organization Leadership
- Project Manager Development

MANUFACTURING SKILLS

- Equipment Assembly
- Equipment Operation
- Forklift
- Machining
- Manufacturing Processes
- Media Transfer Protocol Test Procedures and Processing

ADVANCED TECHNOLOGY (Ratio 1:10)

- 3-D Printing
- Capability Maturity Model Program Training
- Engineering (Video Image)
- Esprit Software

- Machine Programming
- Software Development

CBT Hours

0 – 100

BUSINESS SKILLS

• 05 Competitors ICG (engl.)	0.25
• 06 Selling points ICG/NIR & PDD & AF section (engl.)	0.5
• KSREG-Unique Device Identification	0.25
• Power Messaging: Corporate Point of View	0.5
• Prof Ed, Foundation: Corporate Playbook New User	0.25
• Prof Ed, Foundation: eLoaner 1.5 eLearning	0.25
• Prof Ed, Foundation: eLoaner Lite iPhone App Brainshark	0.25
• Prof Ed, Foundation: Hospital Navigation	1
• Prof Ed, Foundation: Inventory Management Brainshark	0.25
• Prof Ed, Service: PROTECTION1 Playbook Assessment	0.25
• Prof Ed: Airway Management: Manual Cleaning of the Flexible Intubation Video Endoscopes Brainshark	0.4
• Prof Ed: Sales Dashboards - Getting Started Brainshark	0.25
• Prof Ed: Sales Policy Jeo-Parody	0.5

COMMERCIAL SKILLS

• 01 Fluorescence Imaging Background (NIR/PDD/AF) (engl.)	0.5
• 01 Gynäkologie - Anatomie	0.25
• 01 Gynecology - Anatomy (mult.)	0.25
• 02 Basics Hysteroscopy (mult.)	0.25
• 02 Introduction Near Infrared (NIR/ICG) (engl.)	0.5
• 03 Applications NIR Fluorescence Imaging in Surgery (engl.)	1
• 03 Diagnostic vs. Operative Hysteroscopy (mult.)	0.25
• 04 Equipment ICG (engl.)	0.25
• 04 Office Hysteroscopy (mult.)	0.25
• 05 Hysteroscopic Sterilization (mult.)	0.25
• 14 Hysterectomy (mult.)	0.25
• Basics of S-Pilot (mult.)	0.5
• Credentialing - Aseptic Techniques	1
• Credentialing - Bloodborne Pathogens Safety	1
• Credentialing - Fire Safety	1
• Credentialing - HIPAA Privacy Practices	0.75
• Credentialing - OR Protocol	1.25
• CS Leader's Standards Rollout 2018 - Mentoring Coaching Model	0.25
• Cystoscopy (engl.)	0.5
• Endoflator 40 and 50 (mult.)	0.25
• ENDOMAT® SELECT (engl.)	0.5
• Fluorescence Imaging - Introduction & Applications (mult.)	0.25
• GHX Order Management - Transaction ZEDI	0.5

• Introduction to Rigid Endoscopes: Their Care and Cleaning	0.5
• Minimally Invasive Surgery: Instrument Readiness	1
• Monitors in Anesthesia (mult.)	0.5
• NIR - Basic Principles of Near Infrared Imaging with ICG (mult.)	0.5
• OR1 AIDA Demo (germ.)	0.25
• PDD - Basic Principles of Photodynamic Diagnosis (mult.)	0.5
• Product Range in Anesthesia (mult.)	0.5
• Prof Ed, Airway Management: Clinical Use of the Flexible Intubation Fiberscope	0.25
• Prof Ed, Airway Management: Dr. George Berci, History of KARL STORZ in Airway Management	0.25
• Prof Ed, Endoscopy Fundamentals, Reprocessing: Fundamentals of Reprocessing Brainshark	0.25
• Prof Ed, Endoscopy Fundamentals, Neuro-Spine-Microscopy: HD Microsurgical Imaging Systems Brainshark	0.25
• Prof Ed, Gynecology and Urology: Understanding the Basics of Electrosurgery	0.25
• Prof Ed, Head and Neck: Functional Endoscopic Sinus Surgery with Prof. Stammberger	0.25
• Prof Ed, Head and Neck: Fundamentals of Endoscopic Ear Surgery by Daniel Lee, MD	0.5
• Prof Ed, Head and Neck: House Ear Institute Video, Part A	0.25
• Prof Ed, Head and Neck: House Ear Institute Video, Part B	0.25
• Prof Ed, Head and Neck: Navigation Panel Unit Assembly Brainshark	0.25
• Prof Ed, Head and Neck: Registration for Surgical Navigation eLearning Course	0.5
• Prof Ed, Power Messaging: Corporate Playbook Assessment	0.25
• Prof Ed, Surgical Specialties, Laparoscopy: Laparoscopic Banded Gastric Bypass Video	0.25
• Prof Ed, Surgical Specialties, Laparoscopy: Laparoscopic Instruments eLearning	0.25
• Prof Ed, Surgical Specialties, Urology: The Davalos Access Technique for Percutaneous Nephrolithotomy eLearning Course	0.5
• Prof Ed, Urology: UH 400 eLearning	0.5
• Prof Ed, Urology: UH 400 Product Launch Brainshark	0.3
• Prof Ed, Video Imaging: Tower Component - AIDA HD Connect Brainshark	0.25
• Prof Ed: Hospital Navigation	0.25
• Sialendoscope	0.5
• Sialendoscopy (mult.)	0.5
• Spatula in Anesthesia (mult.)	0.5
• TIPCAM1 S 3D ORL (mult.)	0.5
• Training Module on C103: HCPs and HCOs & C111: Government Personnel	0.25
• Training Module on C104: Discounts, Rebates & Other Pricing Policy and C105: Free Goods & Services	0.25
• Training Module on C106: Educational and Research Grants and Charitable Donations	0.25

- Training Module on C107: Product Promotion 0.25
- Training Module on C108 Attendance in Patient Procedures 0.25
- Training Module on C109: Product-related training 0.25
- Training module: Commercial Compliance Introduction 0.25
- Uretero-Renoscropy - URS (engl.) 0.5
- VisitOR1 (engl.) 0.5

COMPUTER SKILLS

- Introduction to LearningSpace for North America Learners 0.5
- Microsoft Office 2010: Managing Information with OneNote 1
- Org Dev. PivotTables and PivotCharts in Excel 2010 1
- Org. Dev. Microsoft Office Skills: Inserting Basic Charts in Excel 2010 1
- PivotTables and PivotCharts in Excel 2010 1
- Prof Ed, Endoscopy Fundamentals, Video Imaging: Video Training Module 1 - Optics 0.25
- Prof Ed, Endoscopy Fundamentals, Video Imaging: Video Training Module 1.5 - Optics Part 2 0.5
- Prof Ed, Endoscopy Fundamentals, Video Imaging: Video Training Module 2 - Imaging Devices 0.5
- Prof Ed, Endoscopy Fundamentals, Video Imaging: Video Training Module 3 - Wiring 0.5
- Prof Ed, Video Imaging: Video Training Module 4, The IMAGE1 S Dashboard 0.25
- Prof Ed, Video Imaging: Video Training Module 5, The IMAGE1 S Live Menu 0.25
- Prof Ed, Video Imaging: Video Training Module 6, the IMAGE1 S Setup Menu 0.25
- Prof Ed, Video Imaging: Video Training Module 7, The IMAGE1 S Setup General Sub-Menu 0.25
- SAP BI Reports - Analysis Office for MS Excel (Intermediate) 0.25
- Using Basic Functions with Excel 2010 1

CONTINUOUS IMPROVEMENT

- Anatomical Directions (engl.) 0.5
- Anatomy and Pathology in Anesthesia (mult.) 0.25
- Anatomy and Pathology in Urology (engl.) 0.5
- Basics about Endoscopy (engl.) 0.5
- Being an Effective Team Member 1
- Care and Handling of Endoscopes, Video Cart Systems and Powered Surgical Instruments 1
- Communication Methods that Make Sense – and Make Your Point 0.6
- Concur Policy Review 2014 0.5
- Concur Section 7 HCP Training 0.25
- Concur Training for New Hires - 2013 0.25
- CS Leader's Standards Rollout 2018 - Expectations 0.25
- CS Leader's Standards Rollout 2018 - Experience Engineering Library 0.25
- CS Leader's Standards ZAssessment 2017 0.25

• CS Order Management Part 1 2017	0.25
• CS Order Management Part 2 2017	0.25
• CS Order Management Part 3 2017	0.25
• CS Standards - Order Management Part 1	0.25
• CS Standards - Order Management Part 2	0.25
• CS Standards - Order Management Part 3	0.25
• CS Standards Rollout 2017_ZAssessment	0.25
• CS Standards Rollout 2018 - Branding Guidelines	0.25
• CS Standards Rollout 2018 - CSAT Metrics	0.25
• CS Standards Rollout 2018 - First Call Resolution	0.25
• CS Standards Rollout 2018 - Operational Guidelines	0.25
• CS Standards Rollout 2018 - Order Management	0.25
• CS Standards Rollout 2018 - Service Excellence - Call Quality	0.25
• CS Standards Rollout 2018 - Service Excellence - Order Quality	0.25
• CS Standards Rollout 2018 - Work Volume Metrics and Expectation	0.25
• CS Standards Rollout 2018 - ZAssessment	0.25
• CS_Gold and Silver P1 Assessment	0.25
• CS_Intro to Avaya One-X Agent	0.25
• CS_Introduction to Verint QM	0.25
• CS_NASM_QuickWin_Jiffy Lube Back End Process Assessment	0.25
• CS_NASM_QuickWin_Jiffy Lube KSE Process Assessment	0.25
• Culture and Its Effect on Communication	1
• Effective Team Communication	1
• ICG Demo (mult.)	0.25
• IMAGE1 S Transition Training Brainshark (Part 2)	0.25
• Information about Anesthesia (mult.)	0.5
• KSEA Training Taskforce: Basic SAP Navigation	0.25
• KSEA Training Taskforce: iSAP Brainshark	0.25
• KSIS Effectiveness Check - Device History Record	0.25
• KSIS Effectiveness Check - Distribution	0.25
• KSIS Effectiveness Check - Non-Conforming Material	0.25
• KSIS_06.A_WI.C Controlled Document Review and Approval	0.25
• KSIS_06.B_FM.A Change Request Form	0.25
• NASM Quick Win - Billing For Loaners Assessment	0.5
• NASM Quick Win - Bronze Shipping Assessment	0.5
• NASM Quick Win - Shipping on Service Orders Assessment	0.5
• NASM Quick Win: Single Billing Assessment	0.5
• NASM_Phase 1_Service Ticket Creation Assessment	0.5
• Org. Dev., Elements of a Cohesive Team	1
• Org. Dev., Introduction to Development Planning in TalentSpace	0.25
• Org. Dev., Introduction to LearningSpace for Users (International)	0.5
• Org. Dev., Introduction to TalentSpace BrainShark Presentation	0.3
• Surgical Instruments: Care and Handling and Sterilization Considerations	0.25
• The Challenge of Cleaning Laparoscopic Instruments	0.25
• Time Management: Quit Making Excuses and Make Time Instead	0.6

HAZARDOUS MATERIALS

- CRED_Electrical_Safety 1
- Radiation Safety for Clinical Health Care Industry Representatives (Clinical HCIRs) 2

MANAGEMENT SKILLS (Managers/Supervisors Only)

- Being a Receptive Communication Partner 0.5
- Building and Leading Teams 0.25
- Business Writing: How to Write Clearly and Concisely 1
- Coaching 0.25
- Emotional Intelligence: Building Self-Management Skills 0.5
- First Time Manager: Challenges 1
- Forming Peer Relationships and Alliances at Work 1
- Getting Results Without Direct Authority: Persuasive Communication 1
- Introduction to Change Management at KARL STORZ BrainShark Presentation 0.25
- Introduction to Project Management using Project 2010 1
- Leadership Essentials: Building Your Influence as a Leader 1
- Management Essentials: Directing Others 1
- Org Dev, Introduction to the Mentoring Associates Program, MAP 0.5
- Power Messaging: KARL STORZ Corporate Point of View Coaching Video 0.5
- Prof Ed, Manager Training: KARL STORZ Selling Skills Brainshark 0.4
- Successful Delegation: Supervise and Encourage 0.4

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



RETRAINEE - JOB CREATION

Training Proposal for:

**Lancaster . Burns Construction, Inc.
dba LB Construction, Inc.**

Agreement Number: ET18-0206

Panel Meeting of: May 24, 2018

ETP Regional Office: Sacramento

Analyst: J.Dongallo

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee Veterans Job Creation Initiative	Industry Sector(s):	Construction Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Placer	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: 250	U.S.: 250	Worldwide: 250
<u>Turnover Rate:</u>	5%		
<u>Managers/Supervisors:</u> (% of total trainees)	7%		

FUNDING DETAIL

<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">Program Costs</td></tr> <tr><td style="text-align: center;">\$247,964</td></tr> </table>	Program Costs	\$247,964	-	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center;">(Substantial Contribution)</td> <td style="text-align: center;">(High Earner Reduction)</td> </tr> <tr> <td style="text-align: center;">\$0</td> <td style="text-align: center;">\$0</td> </tr> </table>	(Substantial Contribution)	(High Earner Reduction)	\$0	\$0	=	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">Total ETP Funding</td></tr> <tr><td style="text-align: center;">\$247,964</td></tr> </table>	Total ETP Funding	\$247,964
Program Costs												
\$247,964												
(Substantial Contribution)	(High Earner Reduction)											
\$0	\$0											
Total ETP Funding												
\$247,964												

In-Kind Contribution:	100% of Total ETP Funding Required	\$391,000
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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, OSHA 10/30, Literacy Skills	303	8-200	0	\$576	\$16.70
				Weighted Avg: 32			
2	Retrainee Veterans Priority Rate	Business Skills, Comm'l. Skills, Computer Skills, OSHA 10/30, Literacy Skills	9	8-200	0	\$704	\$16.70
				Weighted Avg: 32			
3	Retrainee Priority Rate Job Creation	Business Skills, Comm'l. Skills, Computer Skills, OSHA 10/30, Literacy Skills	61	8-200	0	\$1,100	*\$13.66
				Weighted Avg: 55			

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

<p>Minimum Wage by County: Job Number 1 and 2: \$16.70 per hour for Placer County Job Number 3 (Job Creation): \$13.66 per hour for Placer County. Health Benefits: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No This is employer share of cost for healthcare premiums – medical, dental, vision. Used to meet the Post-Retention Wage?: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Maybe Up to \$2.05 per hour may be used to meet the Post-Retention Wage in Job Numbers 1 & 2; up to \$1.66 per hour in Job Number 3.</p>

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1 (Retrainee)		
Administration Staff		33
Production Staff		231
Technical Staff		15
Supervisors/Managers		24
Job Number 2 (Veterans)		
Production Staff		9
Job Number 3 (Job Creation)		
Administration Staff		4
Production Staff		50

Technical Staff		6
Supervisors/Managers		1

INTRODUCTION

Founded in 1992 and headquartered in Roseville, Lancaster . Burns Construction, Inc. dba LB Construction, Inc. (LBC) (www.lbconstructioninc.com) fabricates and constructs steel foundations, drywall, rough carpentry, wood and metal stud install-ready assemblies. LBC's customers include domestic general contractors in the construction industry. Notable recent projects include the Ice Block projects and B Street Theater's new facility, in Sacramento, and Fairway One in Pebble Beach. Training will take place at LBC's Roseville location.

PROJECT DETAILS

This is LBC's third ETP Agreement, and the third in the last five years. Training under previous agreements focused on assembly techniques, new equipment and LEED. In this proposal, LBC will focus on improving efficiency, productivity, and new technology software. The Company will also provide training on new equipment, advanced production processes, and other software programs. There will be no duplication of training for trainees who participated in the prior contract.

LBC continues to upgrade processes and technology to keep pace with industry and customer demands. The Company recently invested \$2.7M on new equipment machinery including Flow Mach 4, JMT Press Brake, Summit Hydraulics and Whitney Punch Plasma. All new equipment is currently being utilized. This new machinery requires staff training in operational and process improvement to be efficient and productive.

LBC has recently added a concrete division. The Company has created internal training programs for all occupations to enhance the skills required within the new division. Staff will receive training in numerous areas of the expansion, such as machinery operation, maintenance, logistics and administration.

In addition, LBC is upgrading its computer software to coincide with its continuous growth. Software upgrades in MegaFab, Bluebean Revu, and SigmaNest require LBC to train staff with the necessary tools to navigate the system and improve processes. The Company has also emphasized job function diversification by creating an internal cross-training program. This training will give trainees transferrable skills that will make them more promotable in the construction industry.

Veterans Program

The Panel has established a higher reimbursement rate and other incentives for training California veterans.

LBC plans to train nine Veterans (Job Number 2) who have served on active full-time duty in the Armed Forces. Veteran trainees in Job Number 2 will receive a higher reimbursement rate of \$22 per hour.

Retrainee – Job Creation

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

To meet the growing demands of this industry, the Company anticipates growing its workforce by 15% in the next 12-18 months. The recently added Concrete Division will require new hires to meet production capacity. The Company also recently purchased new equipment, such as Flow Mach 4, JMT Press Brake, Summit Hydraulics and Whitney Punch Plasma. LBC has committed to hiring 61 new employees in Production, Technical and Administration for Job Number 3.

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

Training Plan

Training will be delivered via Class/Lab and E-Learning.

Business Skills: Training will be offered to all occupations and include Customer Services and Communication with Clients, Quality Systems for New Initiative, and Sales and Marketing for New Products.

Commercial Skills: Training will be provided to Managers, Production and Technical Staff. Training will focus on skill sets that will create better production efficiencies. Training topics include Steel Erection and Rigging Skills, Proper Tool Handling and Maintenance, Metal Fabrication and Welding Technology Training and Interpreting Structural Drawings.

Computer Skills: Training will be provided to all occupations in Bluebean Revu, Flow Xpert/Flow Path, MegaFab, and SigmaNest.

Literacy Skills: Training will be provided to Production Staff to ensure effective communication in supporting business processes. Training topics include Vocational Language Skills.

Certified OSHA Safety Training

OSHA 10/30 is a training series that is 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 staff. The coursework is specified for construction work and manufacturing and must be approved by Cal-OSHA. In addition, the instructors for this course must be certified by Cal-OSHA. Successful completion of this training is supported by a Certificate. Being OSHA certified often results in higher employment marketability.

LBC's clients require employees to obtain certified OSHA training. This certification will help the Company to meet current bidding requirements and obtain new contracts/projects.

Commitment to Training

LBC's current annual training budget is \$500,000. Training includes state-mandated safety training, equipment maintenance and installation, customer services and communication, and sales and marketing 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.

ETP funds will support the Company's ongoing financial commitment to training. At the completion of the ETP training, LBC will continue to provide its workforce the skillsets needed to develop and grow within the Company.

Training Infrastructure

The Training, Staffing and Safety Coordinator and Vice President will plan and oversee all aspects of training. These are the same individuals who oversaw the administration of the prior ETP Agreement. The Company already has a process in place to ensure all administrative duties are handled properly and all unit managers are aware of their responsibilities. In addition, the Company has retained the services of a third party as an administrative subcontractor to assist with all administrative requirements.

Training will be delivered by in-house experts and vendors as needed.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0432	Roseville	5/04/15 - 5/03/17	\$140,280	\$140,280 (100%)
ET13-0211	Roseville	11/19/12 - 11/18/14	\$99,900	\$97,868 (98%)

DEVELOPMENT SERVICES

Prospect Consulting Group, Inc. (PCG) assisted with the development for a flat fee of \$6,600.

ADMINISTRATIVE SERVICES

PCG 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

- Customer Service and Communication with Clients
- Quality Systems for New Initiatives
- Sales and Marketing for New Products

COMMERCIAL SKILLS

- Commercial Concrete and Masonry Construction Skills
- Interpreting Structural Drawings
- Metal Fabrication and Welding Technology Training
- Metal Stud and Drywall Cross-Training
- Proper Tool Handling and Maintenance
- Rough Carpentry Skills
- Steel Erection and Rigging Skills
- New Equipment Operations
 - Flow Mach4 Waterjet
 - JMT Press Brake
 - Summit 10' Shear
 - Whitney Parts Processor

COMPUTER SKILLS

- New Technology Software
 - Bluebeam Revu
 - FabSuite
 - Flow Xpert/Flow Path
 - MegaFab
 - SigmaNEST
 - TEKLA Structures BIM Software

OSHA 10/30 (OSHA Certified Instructor)

- OSHA 10 (requires 10 hours completion)
- OSHA 30 (requires 30 hours completion)

LITERACY SKILLS

- Vocational Language Skills

E-Learning Hours

8-200 Trainees may receive any of the following:

BUSINESS SKILLS

- Customer Service and Communication with Clients
- Quality Systems for New Initiatives
- Sales and Marketing for New Products

COMMERCIAL SKILLS

- Interpreting Structural Drawings

COMPUTER SKILLS

- New Technology Software
 - Bluebeam Revu
 - FabSuite
 - Flow Xpert/Flow Path
 - MegaFab
 - SigmaNEST
 - TEKLA Structures BIM Software

LITERACY SKILLS

- Vocational Language Skills

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



Training Proposal for:

Lili Mirtorabi, D.D.S., A Professional Corporation

Agreement Number: ET18-0216

Panel Meeting of: May 24, 2018

ETP Regional Office: North Hollywood

Analyst: L. Vuong

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate SET HUA	Industry Sector(s):	Healthcare Services Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles, Orange	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: 145	U.S.:145	Worldwide: 145
<u>Turnover Rate:</u>	4%		
<u>Managers/Supervisors:</u> (% of total trainees)	17%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$130,680		\$0	\$0		\$130,680

In-Kind Contribution:	100% of Total ETP Funding Required	\$137,940
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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 HUA	Business Skills, Commercial Skills, Computer Skills	110	8-200	0	\$1,188	*\$13.25
				Weighted Avg: 66			

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

Minimum Wage by County: SET-HUA Wage of \$13.25 per hour for Los Angeles County.

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

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

Up to \$1.60 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Administrative Staff		17
Sterilizer Staff		9
Dental Assistant		47
Laboratory Technician		9
Call Center Staff		9
Manager/Supervisor (Frontline)		19

INTRODUCTION

Founded in 1999, Lili Mirtorabi, DDS., A Professional Corporation (Lili Mirtorabi) (www.DrLiliOrthodontics.com), specializes in orthodontics for children and adults. The Company offers a full orthodontic treatment, which includes evaluation and treatment, x-rays, photos, models, braces, retainers and appliances. The Company also has 3 in-house laboratories which create and repair retainers and appliances.

Headquartered in Huntington Park, the Company has six locations: two in Huntington Park and one each in El Monte, Lawndale, Santa Ana, and Whittier. This proposal will target workers from Huntington Park and El Monte only.

PROJECT DETAILS

This will be Lili Mirtorabi's third ETP proposal and second in the last five years. In the previous proposal incumbent workers were trained on basic job related skills to keep up with industry requirements and customers demands and increase services to support business operations. For this proposal, Lili Mirtorabi will provide software training, new and more complex laboratory

equipment skills, upgraded workforce skills, and processes and practices training to exceed customer demands.

Lili Mirtorabi is currently experiencing rapid growth. Since last year, Lili Mirtorabi's workforce has grown from 111 to 145 employees and has experienced a 15% growth in patients. The Company plans to expand dental services by opening new offices in Los Angeles and Anaheim in the next year. In addition, the Company plans to expand its call center to better serve customers and build an innovation laboratory and office to keep up with technological advances. The Company will also be upgrading and purchasing new equipment and software including phone systems, 3D digital scanner, mixer, medical machines and imaging software. The Company needs to support this growth with employee training. Training will help the Company keep up with industry requirements, technological changes, and customer demands in a constantly changing environment.

Additionally, the Company is in the process of developing an internal training program to improve business functions and support operations as the Company continues to grow.

Training Plan

Lili Mirtorabi's training goal is to provide fully equipped state of the art dental services and products, deliver excellent customers' services and patient care, improve workforce competency, increase patient retention, and facilitate employee job satisfaction. Classroom/Laboratory and Videoconference training will be provided as follows:

Business Skills: This training will be offered to all occupations. Training will focus on customer service, communication, billing and performance to allow employees to perform their jobs more effectively.

Commercial Skills: This training will be offered to all occupations. Trainees will learn and improve dental and patient applications, new equipment, procedures and fabrication.

Computer Skills: This training will be offered to all occupations. Trainees will gain knowledge and skills in databases, patient records software, and automations systems.

Frontline Worker

Lili Mirtorabi will be training frontline Managers and Supervisors. These employees communicate and interact with patients and family members and are available to provide services at all times. These individuals spend 100% of their time performing frontline work and do not hire, fire or make company policy. Based on the nature and scope of their job duties, these trainees meet the Panel's definition of frontline workers. As frontline workers, these trainees qualify for SET funding.

Commitment to Training

Lili Mirtorabi's annual training budget is approximately \$95,000 for all facilities. The Company provides mandatory new-hire orientation, sexual harassment prevention, first-aid training, job skills training, OSHA mandated safety training, and on-the-job training related to dental procedures and requirements.

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

Training is scheduled to begin upon Panel approval and will be delivered on-site by in-house staff and vendors, as needed. The Assistant Director and nine staff will oversee ETP training and all administrative responsibilities, including enrolling trainees; tracking, scheduling, recording, and verifying training; securing rosters; and ensuring compliance with all ETP requirements.

Special Employment Training (SET)

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

High Unemployment Area (HUA)/Wage Modification

All trainees in Job Number 1 work in Huntington Park and El Monte (Los Angeles County), High Unemployment Areas (HUA) with unemployment exceeding the state average by 25%. These trainees qualify for the ETP Standard Minimum Wage. Additionally, the Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. Lili Mirtorabi requests this wage modification from \$17.54 per hour to \$13.25 per hour for these trainees.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned	
				\$	%
ET15-0109	Los Angeles	07/07/2014– 07/06/2016	\$99,885	\$99,885 (100%)	

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum**Class/Lab and Video Conference Hours**

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- Customer Service
- Handling Correspondence, Billing, and Bookkeeping
- Intermediate and Advanced Microsoft Office
- Dental Procedures and Practices
- Timesheet Management
- Performance Management
- Communication
- Business Development
- Business Operations
- Accounts Payable and Receivable
- Office Administration

COMMERCIAL SKILLS

- Dental/Orthodontic Technology
- Orthodontic Appliances
- Orthodontic Procedures
- Sterilization Procedures
- Patient Records Procedures
- Orthodontic Appliance Fabrication
- Treatment Rooms Preparation
- Dental Equipment
- Panoramic and Cephalometric X-Ray Machine
- PA X-Ray Machine
- Autoclave and Dry Heat Sterilizer
- Alginate Mixer Machine
- Retainer Vacuum Forming Machine

COMPUTER SKILLS

- Electronic Insurance Billing
- iTero 3D digital Scanner
- Orthotrac Software
- Panoramic and Cephalometric X-Ray Machine (Software)
- PA X-Ray Machine (Software)
- Cisco Phone Systems

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

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



TRAINING PROPOSAL FOR

Matthew Warren, Inc.

18-0601

Panel Meeting Date: 05/24/2018

Regional Office: North Hollywood Regional Office

Analyst Name: Mark Reeves

Type of Proposal: Single Employer

Funding Source: Out-of-State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$204,120.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$204,120.00	N/A	\$0.00	\$254,292.00

APPLICANT PROFILE

Company Summary	Matthew Warren, Inc. (MWI) manufactures and distributes precision engineered critical components servicing the spring and specialty fastener markets.
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Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 191	US: 1,650	World Wide: 1,650
Turnover Rate (Applicant)	12.00 %		
Repeat Contractor	No		
High Unemployment Area	Yes		
Union(s)	No		

TRAINING PROFILE

Training Objective(s)	Training will improve operational efficiency at the Helical and Century locations by developing and upgrading the manufacturing skill level of employees at both facilities.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	189	\$18.00	60	\$1,080	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

MWI is headquartered in Illinois and has several manufacturing locations/brands across the country. MWI's two California locations operate under the brand names of Helical Products Company and Century Spring Corp. Both of these California locations will participate in the proposed training.

Located in Santa Maria, Helical Products Company (Helical) uses proprietary processes to manufacture machined springs, flexible couplings and u-joints. Helical parts are made with steel, stainless steel, aluminum, and other materials including exotic metals. Located in Commerce Century Spring Corp. (Century) is a full-service manufacturer of high quality custom springs including an extensive selection of compression, extension, torsion, tapered, urethane, die, disc, H-clip, specialty springs and washers.

Both Helical and Century utilize the latest technology and equipment to design, develop, and produce custom products for markets such as aerospace, industrial, motorsports, consumer products/power tools, agriculture, construction, energy/oil/gas, medical, transit, automotive, heavy truck and military.

This will be MWI's first ETP Agreement.

2. Current Training Project Details

Purpose of Training	<p>MWI manufactures products for many customers during business in heavily regulated industries with extremely high quality standards. Aerospace/aviation industry standards in particular call for detailed traceability in the product production used for various applications. MWI anticipates growth in this industry over the next several years and is scaling up its internal capability and capacity to meet the expected rise in demand for its products. MWI (facilities such as Helical and Century) must integrate continuous improvement techniques and business practices designed to enhance the Company's manufacturing processes, product quality and operating performance.</p> <p>The proposed training will help the Company improve productivity, generate growth, and preserve tribal knowledge by retaining highly skilled talent. Training will take place at the Company's facilities in Santa Maria and Commerce.</p>
Training Infrastructure and Administrative Plan	<p>The Human Resources Manager at the Century location has prior ETP experience and will work cooperatively with Human Resources personnel and department heads at both locations to enroll trainees, schedule training and track training hours.</p> <p>Course instruction will be provided by in-house experts.</p>
Marketing Plan (MEC Only)	N/A

PROPOSED TRAINING PROJECT DETAILS

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

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
<p>All occupations will receive Business, Computer (Standard) and Continuous Improvement Skills. Engineering Staff will receive Computer Skills (Advanced Technology). Maintenance Staff, Operators, Production Staff, Warehouse Staff, Material Handlers, and Managers will receive Hazardous Materials Skills. Managers will receive Management Skills. Production Staff, Operators, Maintenance Staff, Quality Assurance Staff, Inspectors, and Warehouse Staff will receive Manufacturing Skills.</p>	

4. Additional Company or Training Project Details

Advanced Technology (AT) training will be provided to Engineering Staff responsible for complex programming, engineering and design. Training will include advanced spring design software, Mastercam, and SolidWorks. The AT Computer Skills courses outlined in the Curriculum require specialized training on sophisticated software and equipment. Therefore, these courses will be delivered with a trainer-to-trainee ratio not exceeding 1:10, thus allowing for in-depth coverage and personal attention from skilled subject matter experts.

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	Planned Course Offerings
Business Skills	Business Performance
	Business Planning
	Business Writing
	Communication Skills
	Conflict Resolution
	Customer Service
	Financial Strategies
	Merchandising
	Negotiation Skills
	New Product Development
	Project Management
	Sales Techniques
Computer Skills (Advanced Technology)	Advanced Spring Design Software
	Mastercam (CAD/CAM program)
	SolidWorks (CAD/CAM program)
Computer Skills (Standard)	Adobe
	Electronic Commerce and e-Business
	Enterprise Resource Planning (ERP)
	Microsoft Office Software Intermediate Level
Continuous Improvement Skills	Decision Making
	ISO 9001 / AS 9100
	Just-In-Time Processing
	Kaizen Methodology
	Leadership Skills for Frontline Workers
	Lean Processes and Principles
	Problem Solving
	Production Scheduling
	Quality Concepts
	Six Sigma
	Statistical Process Control (SPC)
	Team Building
	Total Quality Management
	Value Stream Mapping
Writing Standard Operating Procedures (SOP)	
Hazardous Materials Skills	Environmental Liability and Risk Management
	Environmental Monitoring & Personal Prot. Equip.
	Hazardous Chemical Cleaning/Handling

Attachment 2 - Training Delivery and Curriculum Listing

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

	Hazardous Materials Handling
	Hazardous Waste Cleaning
	Hazardous Waste Management and Transportation
	Solid Waste Recycling
Management Skills	Administration
	Coaching
	Leadership
	Motivation
	Strategic Deployment Planning (SDP)
Manufacturing Skills (ME) (Standard)	Assembly Procedures
	Blueprint reading
	CNC Machine Operation
	CNC Programming
	Coordinate Measurement Machine Inspection (CMMI)
	Cross-Training in Production Equipment/Skills
	Equipment Operations
	Fundamentals of Planning
	Geometric Dimensioning and Tolerancing
	Grinding Principles
	Heat Treat Principles
	Hydraulics
	Inspection Techniques
	Inventory Control
	Manufacturing Control
	Manufacturing Practices
	Metal Finishes
	Metallurgy
	Operations Management
	Parts and Products Manufacture
	Production Operations
	Reverse Engineering
	Shop Math
	Tool and Dye Making
	Warehousing



TRAINING PROPOSAL FOR
Menchie's Group Inc
18-0559

Panel Meeting Date: 05/24/2018
Regional Office: North Hollywood Regional Office
Analyst Name: Monique Webb
Type of Proposal: Single Employer (SB), Small Business Program
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 72,270.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 72,270.00	N/A	\$ 0.00	\$ 351,178.00

APPLICANT PROFILE

Company Summary	Menchie's Group, Inc. is the world's largest self-serve frozen yogurt franchise. MidiCi Group, LLC is an affiliated franchise for Neapolitan pizza.		
Industry Sector(s)	Services (Other)		
Priority Industry	No		
No. Employees (Applicant)	State: 79	US: 79	World Wide: 79
Turnover Rate (Applicant)	15.00 %		
Repeat Contractor	No		
High Unemployment Area	No		
Union(s)	No		

TRAINING PROFILE

Training Objective(s)	Training will ensure staff is equipped with the knowledge and skills to train new franchise owners and market Menchie's and Midici franchises to potential business owners.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	65	\$ 22.00	45	\$ 990	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	8	\$ 22.00	45	\$ 990	8 - 60

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 2007 and headquartered in Encino, Menchie's Group Inc., (Menchie's) is the nation's largest self-serve frozen yogurt franchise. In 2015, the Company launched a co-brand, and affiliate company, Midici Group, LLC, which specializes in pizza. Both businesses are owned and operated from company headquarters in Encino. Training under this proposal will be provided for Menchie's and Midici staff working at company headquarters in Encino. This will be the Company's first ETP Agreement.

Menchie's has more than 540 locations around the world, with stores in further development throughout the U.S.A., Canada, Puerto Rico, England, South Africa, Kuwait, Bahrain, The Bahamas, Bangladesh, Guatemala, United Arab Emirates, Qatar, India, China, and Japan. The latest franchise, MidiCi, is poised to capture the pizza market quickly and plans to open 1,000 Neapolitan pizza franchises by 2025.

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

Frozen yogurt is an \$8 billion industry in the United States. Within the last year, Menchie's and MidiCi franchises have continued to expand, to what is now over 540 locations. By the end of 2018, the Company anticipates adding another 60 new locations. Both franchises have become well-known brand names, increasing its appeal for those looking to own their own business/franchise. Menchie's provides new franchise owners training and support to ensure new locations are successful and workers have the necessary skills to operate successfully. Menchie's and MidiCi Employees working from company headquarters (corporate support services) will receive training under this project. No employee working at franchise locations will receive training under this Agreement.

Trainees in this proposal will receive training in Business, Computer, and Continuous Improvement Skills to gain the knowledge and skills to train new franchise owners, as well as increase efficiencies within the Company. Training will include franchise customer care to teach how to cross-train franchise owners efficiently and in a timely manner. Course topics include Business Planning/Administration, Product Knowledge, Customer Relations, and Equipment Operation.

Training will increase trainee skills in merchandising, negotiation, team-building, and problem solving. Training will improve internal business processes as well as staff computer skills in Microsoft

PROPOSED TRAINING PROJECT DETAILS

	<p>Office and Network Management.</p> <p>Staff who speak English as a second language will also receive Vocational English training to improve communication skills. Approximately \$225K is spent annually on training in California. This will be the Company's first ETP Agreement.</p>
Training Infrastructure and Administrative Plan	<p>Menchie's has formed an administrative team to support ETP training. The Vice President and Controller will oversee training, ensuring proper documentation of training, and training rosters are completed. Over the duration of the Agreement, department heads will be responsible for reaching monthly training goals and report all training and documentation to the administration team. Training will be delivered by in-house instructors.</p> <p>The Company has begun preparing and distributing training schedules 3 months in advance and plan to implement monthly compliance meetings with a hired third party administrator, Judith's Training Services, LLC.</p>
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

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

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

4. Additional Company or Training Project Details

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

PROPOSED TRAINING PROJECT DETAILS

4.1 Program Waivers

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

Waivers	Description
None have been requested.	

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Judiths Training Services, LLC	Los Angeles	\$7,200
Administrative	Judiths Training Services, LLC	Los Angeles	10% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Accounting
	Business Planning/Administration
	Business report writing and editing
	Conflict Management
	Customer Relations/needs
	Evaluations/Monitoring
	Interpersonal Skills
	Marketing
	Merchandising
	Negotiating
	Notary Documentation
	Payroll
	POS - Computer/Cash register Transactions
	Product Knowledge
	Quality Control
	Resolving Complaints
	Store Open/Close
	Strategic Planning
	Telephone Skills
Computer Skills (Standard)	Adobe
	Designing and developing software and applications
	Excel
	Local Area Networks (LAN)
	Microsoft Office
	Network Management
	Outlook
	Power Point
	Wide (WAN)
	World Wide Web (WWW)
Continuous Improvement Skills	Decision Making
	Equipment Operation
	Flavor Development
	Inventory control
	Just In Time process (JIT)
	Leadership Skills for Frontline Workers
	Practice and procedure
	Problem Solving
	Process Improvement
	Production Scheduling/Production Operations

Attachment 2 - Training Delivery and Curriculum Listing

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

	Quality Concepts
	Team Building
	Total Quality Management
Literacy Skills	Vocational English as a second language (VESL)



**TRAINING PROPOSAL FOR
PROFIT RECOVERY PARTNERS, LLC
17-0962**

Panel Meeting Date:	05/24/2018
Regional Office:	San Diego Regional Office
Analyst Name:	Joe Davey
Type of Proposal:	Single Employer (SB), Small Business Program
Funding Source:	Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$95,480.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$95,480.00	N/A	\$0.00	\$125,950.00

APPLICANT PROFILE

Company Summary	Founded in 1980 and headquartered in Costa Mesa, Profit Recovery Partners, LLC, (PRP) (www.prpllc.com) is a professional services firm that develops, implements and manages cost-reduction solutions for FORTUNE 1000 companies, law firms, private equity firms and private companies throughout North America.		
Industry Sector(s)	Professional, Scientific, and Technical		
Priority Industry	No		
No. Employees (Applicant)	State: 95	US: 95	World Wide: 95
Turnover Rate (Applicant)	10.00%		
Repeat Contractor	No		
High Unemployment Area	No		

Union(s)	N/A
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TRAINING PROFILE

Training Objective(s)	PRP seeks ETP funding to train in Business, Commercial, Computer, and Continuous Improvement skills enabling staff to analyze client expenses and save its clients money.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	82	\$22.00	45	\$990	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	13	\$22.00	50	\$1100	8 - 60

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Profit Recovery Partners (PRP) is a consulting firm that develops, implements, and manages solutions to help its customers purchase supplies and services from vendors at the best possible prices. By conducting in-depth audits of a company's current spending practices and using a list of preferred suppliers (vendors), the company develops strategies and solutions to lower costs of supplies and services. PRP's purchasing power derives from the hundreds of contacts it develops. In turn, the suppliers (vendors) the Company works with seek to provide PRP's clients with the most favorable terms and highest quality service.

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>PRP's clients require more services. The Company competes with larger out-of-state competitors. PRP's employees must be knowledgeable of the various industries the Company serves. In order to win more contracts and maintain their current client base, the Company must develop employee negotiation, presentation, and management skills. Employees require training in excel and data analytic skills, and business intelligent software skills.</p> <p>Training Plan</p> <p>Business skills - all trainees will receive leadership, management, business development, and communication skills to interact with and negotiate on behalf of clients.</p> <p>Commercial Skills - all trainees will receive accounting and auditing skills to analyze client expenses and recommend cost savings; industry best practices to reduce operating expenses; comprehensive review to review client expense ledgers; and product knowledge among other topics. Training in these skills are designed to conduct detailed audits and in-depth business analysis to provide recommend cost savings.</p> <p>Computer Skills - all trainees will receive training in Customer Relationship Management (CRM) software, MS Office, Quick Books, and other software applications. PRP uses its expertise in technology to transform spend data into actionable information. Trainees need to become experts in these applications to better serve client's needs.</p> <p>Continuous Improvement Skills - all trainees will receive training in Improving Workflow and Schedules, Problem Solving, Process Improvement and Team Building/Team Meetings. Training will improve internal processes, streamline workflow, and provide all employees the ability to solve internal problems.</p>
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PROPOSED TRAINING PROJECT DETAILS

Training Infrastructure and Administrative Plan	<p>Most of the training will be provided by internal trainers; however, some training may be provided by vendors if needed.</p> <p>The Owner and Human Resources Manager will plan, coordinate, and schedule training, with the assistance of the Company's Department heads. The Owner and Human Resources Manager will collect rosters and verify they have been completed correctly. Training Funding Source will assist in enrolling trainees, tracking training hours, and providing reports to the Company.</p>
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Training Type/Level	Sample Classes
Business Skills	Business Etiquette/Writing Skills
	Coaching/Communication
	Customer Service Skills
Commercial Skills	Accounting & Audit procedures
	Best Practices
	Client Procurement process
Computer Skills	Customer Relationship Management (CRM)
	Microsoft Office
	Power Business Intelligence (BI)
Continuous Improvement	Improving Workflow and Schedules
	Problem Solving
	Process Improvement

4. Additional Company or Training Project Details

4.1 Program Waivers

No waivers have been applied to this proposed project.

PROPOSED TRAINING PROJECT DETAILS

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Training Funding Source	Seal Beach	\$4,990.00
Administrative	Training Funding Source	Seal Beach	13% of funds earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Business Etiquette/Writing Skills
	Coaching/Communication
	Customer Service Skills
	Leadership
	Negotiation Skills
	Presentation Skills
	Risk Analysis
	Sales/Business Development
	Standard Operating Procedures
	Time Management
Commercial Skills (Standard)	Accounting & Audit procedures
	Best Practices
	Client Procurement process
	Comprehensive Review
	Employee Retirement Income Security Act
	Employer Benefit Plans
	Estates and Trusts Procedures
	Expense Reduction
	Fraud (detection, analysis, review)
	Insurance
	Product Knowledge
	Professional relationships
	Project Management
	Tax Strategies/Updates
Vendor Audit	
Computer Skills (Standard)	Customer Relationship Management (CRM)
	Microsoft Office
	Power Business Intelligence (BI)
	QuickBooks
	Smartsheet
	Timekeeping (Paycom)
Continuous Improvement Skills	Improving Workflow and Schedules
	Problem Solving
	Process Improvement
	Team Building/Team Meetings



**TRAINING PROPOSAL FOR
Quick Crete Products Corp.
18-0660**

Panel Meeting Date: 05/24/2018
Regional Office: San Diego Regional Office
Analyst Name: Heather Bernard
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 83,090.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 83,090.00	N/A	\$ 0.00	\$ 105,658.40

APPLICANT PROFILE

Company Summary	Quick Crete Products Corporation (QCP) (www.qcp-corp.com) manufactures precast concrete architectural amenities and site furnishings for businesses, parks, arenas, hospitals and residential units.
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Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 159	US: 159	World Wide: 159
Turnover Rate (Applicant)	10.00 %		
Repeat Contractor	No		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Training will help incumbent staff with skills required to successfully roll-out new product lines. Additionally, this proposal will train newly hired production staff on products and processes.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	69	\$ 18.00	45	\$ 810	8 - 200
2	Job Creation – Retrainee Initiative Program, Retrainee	17	\$ 20.00	80	\$ 1600	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

QCP, founded in 1976 and headquartered in Norco, creates custom made concrete features for businesses, parks, arenas, hospitals and residential units. Products include concrete planters, benches, security features, waste containers, fountains and signs for open spaces. QCP designs and manufactures all products in house. The Company works primarily as a subcontractor on large constructions projects such as Disneyland upgrades, the Golden 1 Center and Kaiser Hospital in San Diego. Employees at the Norco location will be the only participants.

2. Current Training Project Details

Purpose of Training	<p>QCP is growing. In 2017, the Company's annual sales increased 10% (from \$15.5 million to \$17 million). This growth is attributed to the growth in the construction industry and is expected to continue, with a goal of reaching \$20 Million by 2020. As a result, QCP expects to increase staff size by 20% in 2018.</p> <p>QCP recently implemented two new product lines. The first is pavers, interlocking pieces of concrete used like stones, tiles or bricks for exterior flooring. The second is fencing plaster caps, decorative pieces placed on top of fences. Both of these new products utilize different raw materials and require new manufacturing molds. Training will cover design, molds, pouring, production, finishing and best practices for engineering, sales and manufacturing staff.</p> <p>Additionally, as a result of the new product lines, QCP purchased a new Frogmill CNC machine which uses digital technology to create concrete molds. This machine will require extensive training for staff. The Company also invested in new software programs, such as Bluebeam (used for converting design documents into PDF) and Salesforce CRM (for sales, service and marketing needs) and upgraded its Sage accounting software. These new and updated programs will require substantial training.</p>
Training Infrastructure and Administrative Plan	<p>QCP's Director of People and Culture will administer and oversee the project. In addition, the Senior HR Administrator will assist with project administration and the Environmental/Safety Coordinator and HR/IT Support staff member will assist with the scheduling training. The Company also retained Welsh Advisors to assist with administration. Training will be provided by in house and external vendors to be determined.</p>
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

PROPOSED TRAINING PROJECT DETAILS

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
Training will be provided in Business Skills, Commercial Skills and Computer Skills to the occupations identified in Attachment 1.	

Delivery Method/Level	Productive Laboratory
Summary	
Training will be provided in Commercial Skills to the occupations identified in Attachment 1.	

4. Additional Company or Training Project Details

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

Retrainee Job Creation

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

QCP is expanding business capacity by hiring new employees. New employees will help the Company during this period of growth. Additionally, new products and purchase of new equipment is also driving the need to hire. The Company has committed to hiring 17 new employees (Group Number 2) within the term of the ETP Agreement (15 production staff, 1 Operations Manager and 1 CAD Drafter). 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.

Productive Laboratory Training

Trainees may produce goods for profit as part of PL training in the courses identified under the Curriculum.

QCP will provide PL training for 15 Job Creation Production trainees. These trainees will require hands-on training to be competent in their new positions. Trainees will receive up to 40 hours of PL at a 1:1 trainer-to-trainee ratio. These trainees will learn to operate manufacturing equipment including concrete mold machinery and the new Frogmill machine and procedures including concrete mix processes, product design, and mold and fabrication techniques. The trainers are supervisors and senior production experts qualified to train on all production equipment.

PROPOSED TRAINING PROJECT DETAILS

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Welsh Advisors, Inc.	Anaheim	\$ 5,816.30
Administrative	Welsh Advisors, Inc.	Anaheim	Not to exceed 13.00% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Communication Skills
	Customer Service
	Leadership Skills
	Marketing Skills
	Project Management Skills
	Teambuilding Skills
Computer Skills (Standard)	Accounting Software
	Autocad
	Bluebeam
	CNC software
	Microsoft Office - Intermediate and Advanced
	NRoute
	Payroll Software
	Sage
	Salesforce
Manufacturing Skills (ME) (Standard)	CNC Machinery
	Kaizen Event Training
	Manufacturing to meet Design Specifications
	New Product Development
	Product Knowledge

<i>Delivery Method /Level</i>	<i>Productive Laboratory</i>
Training Type (Level)	Planned Course Offerings
Manufacturing Skills (ME) (Standard)	CNC Machinery
	Concrete Mix Design
	Concrete Specialty Training
	Design Techniques
	Design using Production Specifications
	Equipment Operations
	Fabrication
	Manufacturing procedures
Production Techniques	

PL Justification and Details

Explain the need for productive laboratory (PL) training	In production and design positions, training requires a hands-on training experience with an expert trainer skilled in concrete production and design techniques. Newly hired production staff receive an extensive 3-week hands-on training in production, design, mold making and finishing techniques. QCP expects these staff to receive up to 40 hours of PL training.
Describe the Equipment/Processes to be used in delivering the PL training	Concrete mold production machinery; equipment operations; concrete product design, mix, pour and finishing techniques

Attachment 2 - Training Delivery and Curriculum Listing

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

Describe Trainer Qualifications	Trainees are senior production experts and supervisors. They have experience in design and production techniques and equipment operations.	
Trainer to Trainee Ratios - If more than one PL class the ratios are the lowest and the highest trainer-to-trainee ratio	Trainer	Trainee
Ratio for One Class, or Minimum When More than One Class	1	1
Ratio for Maximum Ratio When More than One Class	1	1
PLT Approval	Yes	



RETRAINEE - JOB CREATION
Training Proposal for:
Reliance Home Services, Inc.
Agreement Number: ET18-0224

Panel Meeting of: May 24, 2018

ETP Regional Office: North Hollywood

Analyst: M. Paccereilli

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative SET Veterans	Industry Sector(s):	Services Construction Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 115	U.S.: 115	Worldwide: 115
<u>Turnover Rate:</u>	14%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$210,000		\$0	\$0		\$210,000

In-Kind Contribution:	100% of Total ETP Funding Required	\$510,000
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET Priority Rate	Business Skills, Comm'l. Skills; Computer Skills; Cont. Imp.; HazMat; OSHA 10/30 PL-Comm'l Skills	110	8-200	0	\$1,350	\$22.77
				Weighted Avg: 75			
2	Retrainee SET Priority Rate Veteran Job Creation	Business Skills, Comm'l. Skills; Computer Skills; Cont. Imp.; HazMat; OSHA 10/30 PL-Comm'l Skills	10	8-200	0	\$1,650	*\$14.62
				Weighted Avg: 75			
3	Retrainee SET Priority Rate Job Creation	Business Skills, Comm'l. Skills; Computer Skills; Cont. Imp.; HazMat; OSHA 10/30 PL-Comm'l Skills	30	8-200	0	\$1,500	*\$14.62
				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 (SET/Priority Ind): \$22.77 per hour
 Job Numbers 2 and 3 (Job Creation): \$14.62 per hour in Los Angeles County

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

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

Up to \$2.45 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		
Technicians		58
Administrative/Sales Staff		22
Installers/Logistics/Delivery Staff		30
Job Number 2 - Job Creation/Veteran		
Technicians		8
Installers/Logistics/Delivery Staff		2

Job Number 3 - Job Creation		
Technicians		20
Administrative/Sales Staff		2
Installers/Logistics/Delivery Staff		8

INTRODUCTION

Founded in 1961, Reliance Home Services, Inc. (Reliance) (www.reliancehs.com) provides installation and repair of HVAC systems, plumbing, and electrical focusing on the residential construction marketplace. This will be Reliance's first ETP Agreement.

Training will be provided to employees of Reliance and its affiliate, Bay Cities Furnace & Air Conditioning Co. Both companies are located in the same facility in Los Angeles. Reliance's current training needs are driven by business improvements and industry-related developments as follows:

- The Company has invested \$190,000 in new IT software systems and new equipment. Training was not included in the purchase price; however, staff training is critical in the proper operation and use of its new systems and equipment.
- Changes to the HVAC and plumbing industries pursuant to Title 24 of the California Building Code require an increase in energy efficiency levels of 25% above the 2008 standards. This requires upgrading employee skills and knowledge in home performance energy efficiency, various types of coolant systems and methodologies, and utilization of digital tools versus the old mechanical and analog devices.
- As an air conditioning service installer, Reliance works with green clean technology known as *Nano Air*, which uses nanotechnology to eliminate the use of common refrigerants. This technology harnesses Nano particles and doesn't use cooling agents like fluorocarbons; thus, cutting the carbon footprint by 50% and toxic CO2 emissions are reduced by 57%. While the Company doesn't develop the technology, employees must be trained in equipment utilizing Nano technology.

Retrainee - Job Creation

Reliance has experienced significant growth in the last three years. Its focus on superior customer service continues to sustain growth beyond the Company's capacity. In order to address the scheduling backlogs of two to three weeks and strong demand for its services, the Company has invested in new software systems and equipment, and is committed to expanding its workforce.

Reliance is committed to hiring and training 40 new employees (Job Numbers 2 & 3). These new employees will attend an intensive program of classroom/lab and productive lab training for three to five weeks, 40 hours per week. The date-of-hire for these trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

Veterans Program

As part of its Job Creation, Reliance plans to hire 10 Veterans within the next 12 months. The Company has developed a recruitment campaign specifically aimed at attracting Veterans.

Reliance partners with Hire a Vet, a local organization that aids in placing local veterans into good jobs. In the Los Angeles County, a large active and retired military demographic exist. The Panel has established a higher reimbursement rate of \$22 per hour for training California veterans, which applies here.

PROJECT DETAILS

Training will help Reliance upgrade the skills of its existing workforce, integrate new employees, and implement improvements designed to enhance productivity, quality service, and overall efficiency. The majority of training will be delivered via class/lab at the Company's Los Angeles facility. PL training will be provided at customer sites.

Training Plan

Business Skills: Training will be provided to all occupations and focus on customer service, communication skills, dispatch procedures, sales procedures and strategies.

Computer Skill: Training will be provided to all occupations in the company's new system, Profit Rhino, relative to the remote, mobile or tablet function depending. Administrative Staff will be trained in advanced and intermediate MS Offices software suite.

Continuous Improvement: Training will be provided to all occupations to improve the overall operational efficiency of the business and improve quality control and standards.

Hazardous Materials: Training will be provided to Technicians and Installers for proper handling and disposal of hazardous materials. Sales staff will also require understanding of hazardous materials for sales and estimating processes.

Commercial Skills: Training will be provided to Technicians and Installers and focus on Title 24 updates, along with the skills and competencies required for HVAC, plumbing and electrical tasks. Sales staff will also be trained in commercial skills in order to have a baseline knowledge to facilitate proper sales and code recommendations to customers.

Certified Safety Training

OSHA 10/30. This training is a series of courses "bundled" by industry sector and occupation. It consists of 10 hours of classroom or CBT training for journey-level workers and 30 hours for frontline supervisors. The coursework is geared to construction 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. Training will be provided to Technicians and Installers to ensure safe working conditions and fulfill current mandates by OSHA certified.

Productive Laboratory

Training will be delivered in a Productive Laboratory (PL) setting. Trainees may produce goods for profit as part of the PL training in the courses identified under the Curriculum.

PL in Commercial Skills will be provided to Technicians and Installers. Workers will receive approximately 60 hours of PL training to deepen and solidify classroom learning, provide specific job site examples on a real time basis that are not easily replicated in a class/lab environment. Most of the trainees receiving 60 hours are new hires in Job Numbers 2 and 3 and lower-skilled incumbents in Job Number 1.

PL training is necessary for trainees who require hands-on skills to service and install new energy-efficient HVAC equipment. Trainers will review process with the trainee, discuss both safety and code requirements, demonstrate the use of necessary tools and or equipment, demonstrate how to complete the task, observe the trainee complete the task, coach the trainee and correct deficiencies, assess progress, and make note of any further training necessary to ensure competency.

Additionally, Sales Staff will receive PL to learn how systems are built and how to estimate installation requirements and costs. All PL training will be provided at a maximum trainer-to-trainee ratio of 1:3, but is typically either 1:1 or 1:2 because trainees work on the job in teams installing or repairing HVAC systems. Trainers will be in-house staff who have been fully trained as experienced Master Technicians and are dedicated to training delivery during all hours of training.

Commitment to Training

ETP funds will not displace the existing financial commitment to training. The Company's current annual training budget is approximately \$397,000. In the past three years, Reliance documented delivery of an average of 8,000 hours per year in OSHA-mandated training and basics of safety, tools and fundamentals of heating, AC and ventilation systems delivered in classroom and on-the-job training.

Safety training is, and will continue to be, provided in accordance with all pertinent requirements

➤ Training Infrastructure

The President will oversee this project and dedicated in-house experts will provide training. An outside administrative consultant has been retained to manage the recordkeeping and to ensure all training records meet ETP compliance.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Synergy Management Consultants, LLC (SMC) in Grass Valley assisted with the development for a flat fee of \$16,800.

ADMINISTRATIVE SERVICES

SMC 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

- Sales Procedures and Strategies
- Communication Skills
- Customer Needs Assessment and Relationship Building
- Customer Service Skills
- Maintenance/Membership Programs
- Negotiation Skills
- Conflict Management
- Marketing
- Presentation Skills
- Dispatch Procedures
- Equipment and Industry Overview
- HVAC PK for Non-Technicians
- Plumbing PK for Non-Technicians
- Product Knowledge/Offerings
- Finance/Accounting Skills
- Business Acumen for Leaders
- Logistics Skills
- Customer Engagement/Retention

COMMERCIAL SKILLS

- Thermal Dynamics
- Switches and Electrical Components
- Heat Pump Systems
- Air Conditioning Systems
- Metering Devices
- System Controls/Smart System Controllers
- Motors
- Inverter Type Motors
- Digital Tools
- Wiring
- Thermostats
- Wireless Technologies/Controls
- Tune Up Procedures
- Field Tools/Gauges
- Digital Tools Gauges
- Air Quality Diagnostics and Methodologies
- Inverter Technology
- Ventilation Systems
- Barriers Methodologies
- Fundamentals of Solar Technology
- Insulating Methodologies
- Residential Indoor Air Quality/Testing
- Maintenance Parts/Supplies—Inventory Management

- Plumbing
- Basic Tools
- Specialized Tools
- Drawings/Plans
- Pipes and Fittings Including Install
- Compression Fittings
- Fixtures and Faucets Including Install
- Disposals
- Drains - Roof/Floor and Area
- Valves
- Water Heaters
- On Demand Hot Water Systems
- Pipes and Supply Lines
- Gas and Fuel Systems
- Back Flow Systems
- Sewage and Pump Systems
- Venting
- Water Pressure Booster and Recirc Systems
- Water Supply Treatment Systems
- Plumbing for Mobile Homes
- Diagnostics
- Septic Systems
- Video Inspection
- Trenchless Replacements
- Plumbing Code
- Electrical Fundamentals
- Electrical Safety and Tools
- Reading Electrical Drawings, Fixture Schematics
- Electrical Components and Devices
- Lighting
- Wiring - Conduits, Cables and Connectors
- Residential Electrical Systems
- High Voltage/Low Voltage Systems
- Trouble Shooting Electrical Systems/Component
- Designing
- New Construction
- Building
- Renovations
- Repairs
- Service
- Demolition

COMPUTER SKILLS

- Profit Rhino (proprietary management software) Skills
- Regulatory Code Research Techniques
- Payment Card Certification
- Tablet Computer Applications
- VOIP
- MS Office Suite (Advanced/Intermediate)

CONTINUOUS IMPROVEMENT

- Leadership Skills
- High Performance Team Building
- Change Management
- Root Cause Analysis
- Problem Solving
- Quality Control/Systems
- Project Management Skills
- Logistics Efficiency
- Kaizen Event Strategy and Implementation.
- Lean Concepts
- Time Management

HAZARDOUS MATERIALS

- Coolant Systems - Evac and Weigh in Procedures
- Handling Hazardous Materials
- HAZMAT Safety
- Material Safety Data Sheets
- Emergency Response and Clean up
- Chemical Substances

OSHA 10/30 (CERTIFIED OSHA INSTRUCTOR)

- OSHA 10
- OSHA 30

Productive Lab

0 – 60

COMMERCIAL SKILLS (Ratio 1:3)

- Thermal Dynamics
- Switches and Electrical Components
- Heat Pump Systems
- Air Conditioning Systems
- Metering Devices
- System Controls/Smart System Controllers
- Motors
- Whole Home Fans
- Inverter Type Systems
- Digital Tools
- Wiring
- Thermostats
- Tune Up Procedures
- Ventilation Systems
- Barriers Methodologies
- Diagnostics
- Scheduling/Logistics
- Plumbing
- Drawings/Plans
- Pipes and Fittings (plastic)
- Copper Pipe and Fittings

- Cast Iron Pipe and Fittings
- Corrugated Stainless Steel Tubing
- Fixtures and Faucets including Install
- Disposals
- Drains
- Valves
- Water Heaters
- On Demand Hot Water Systems
- Pipes and Supply Lines
- Gas and Fuel
- Back Flow Systems
- Sewage and Pump Systems
- Buried Water and Sewer Lines
- Venting
- Water Pressure Booster and Recirc Systems
- Water Supply Treatment Systems
- Plumbing for Mobile Homes
- Septic Systems
- Video Inspection
- Trenchless
- Sealants
- Remodel Replacement

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



**Retrainee - Job Creation
Training Proposal for:
Safety Striping Service, Inc.**

Small Business

ET18-0233

Panel Meeting of: May 24, 2018

ETP Regional Office: Sacramento

Analyst: D. Jordan

CONTRACTOR

- Type of Industry: Construction

 - Number of Full-Time Employees
 - California: 24
 - Worldwide: 24
 - Number to be trained: 34

 - Out-of-State Competition: No OSC
 - Special Employment Training (SET): Yes No
 - High Unemployment Area (HUA): Yes No
 - Turnover Rate: 3%
 - Repeat Contractor: Yes No
- Priority Industry: Yes No
- Owner Yes No

FUNDING

- Requested Amount: \$53,040
- In-Kind Contribution: \$57,450

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 SET HUA	Business Skills, Commercial Skills, Computer Skills, HazMat, HAZWOPER, OSHA 10/30	24	8-60	0	\$1,320	*\$12.53
				Weighted Avg: 60			
2	Retrainee Job Creation Initiative SET HUA	Business Skills, Commercial Skills, Computer Skills, HazMat, HAZWOPER, OSHA 10/30	10	8-60	0	\$1,560	*\$11.00
				Weighted Avg: 60			

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

- Reimbursement Rate: \$26 SB Priority
- County(ies): Tulare
- Occupations to be Trained: Administrative Staff, Laborers, Shop Personnel
- Union Representation:
 - Yes Laborers' International Union of North America Local 1184; Northern California Laborers Joint Apprenticeship Training Committee
 - No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: Propel Consulting Group, of El Dorado Hills assisted with development for a flat fee of \$3,500.
- Administrative Services: Propel Consulting Group will also perform administrative services for a fee not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

OVERVIEW

Founded in 1950 and headquartered in Goshen, Safety Striping Service, Inc. (SSSI) (www.safetystriping.com) is a family-owned and operated pavement-marking contractor on roadways, highways, airport expansions and residential subdivisions statewide. SSSI's main customers are general contractors on public works projects. The Company's location in Goshen will be the only facility participating in ETP training. This will be SSSI's first ETP contract.

Need For Training

Senate Bill No. 1 allocated billions of new dollars towards highway projects. Additionally, the California high speed rail project requires striping services and has a significant budget allocated towards those needs including \$200M for striping projects in the next several years. Consequently, SSSI anticipates revenue increasing by as much as 100% in the next several years. Consequently, the Company needs to train employees to be more efficient. The Company will also be hiring new employees to prepare for anticipated growth.

Additionally, the Company will be purchasing new equipment including Thermo Striper, Mobile Retro Reflectometer, CAT Skidsteer, Mini Mac and Street Sweeper. Employees will need training to operate and maintain these equipment. Furthermore, manufacturers of highway tape are moving towards products with five year warranties. This change requires all installers to be trained and certified.

Union Support

The training project is supported by Laborers' International Union of North America Local 1184 and Northern California Laborers Joint Apprenticeship Training Committee. A union letter of support has been submitted for each for the training of their respective members.

Retrainee - Job Creation

SSSI will be expanding business capacity by hiring new employees to staff for the anticipated growth. The Company has also purchased new equipment. The Company has committed to hiring 10 new employees, Administrative Staff, Shop Personnel, and Laborers (Job Number 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

Training Plan

Training will be provided via classroom/laboratory methods. In-house subject-matter experts and vendors may be utilized to deliver training in the following:

Business Skills: Training will be offered to Administrative Staff. Training will focus on customer service, project management, sales and marketing techniques.

Commercial Skills: Training will be offered to all occupations. Training will focus on working with machinery and products. Administrative staff will be included so they can understand equipment to manage projects correctly. Training topics will include Hand Equipment Training, Paint Striping and Site Prep.

Computer Skills: Training will be offered to Administrative Staff. Training will allow staff to provide upper management with an accurate financial picture of projects, control costs, and

status reports. Topics will include Intermediate and Advanced Microsoft Office, Mobile Time Keeping, and Digital Daily Reporting.

Hazardous Materials Skills: Training will be offered to Shop Personnel and Laborers. Training will focus on the understanding of materials and disposal methods. This training is highly technical and meets all industry and OSHA governmental standards.

Certified Safety Training

OSHA 10/30. Training will be offered to Shop Personnel and Laborers. 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.

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. Training 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.

➤ Training Infrastructure

SSSI has a detailed training plan in place and is ready to begin training upon approval. The Company’s Vice President of Operations and some Administrative Staff will oversee the training project. In addition, the Company has retained the services of a third-party subcontractor to assist with administration.

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

- Business Finance
- Customer Service Training
- Leadership Training
- Managing People
- Marketing/Sales Techniques
- Negotiating Skills
- Project Management
- Sales Training
- Time Management

COMMERCIAL SKILLS

- Air Resources Board (ARB) Compliance
- CAT Skidsteer Equipment
- Commercial Driver
- Daily Reporting/Job Costing
- Flagger Training
- Forklift Training
- Hand Equipment Training
- Material Handling/Storage
- Mini Mac Equipment
- Mobile Retro Reflectometer
- Paint Striping/Marking Equipment & Methods
- Pavement Marking Technician Training
- Silica Complicance
- Site Prep/Layout Methods
- Skid Steer Training
- Street Sweeper Equipment
- Stripe Removal Methods
- Storm Water Pollution Prevention Plan (SWPPP) Training
- Thermo Striping Equipment & Methods
- Truck Mounted Attenuator (TMA) Training
- Traffic Control Technician
- Vendor Certification Courses

COMPUTER SKILLS

- Digital Daily Reporting
- GPS/ELD Software Training
- Intermediate/Advanced Microsoft Office
- Mobile Time Keeping
- Network/IT Training
- ProContractor/Viewpoint
- Traffic Control Software

HAZARDOUS MATERIALS

- HAZMAT Handling

HAZWOPER

- HAZWOPER Refresher
- HAZWOPER (24 – Hour Course)
- HAZWOPER (40 – Hour Course)

OSHA 10/30 (OSHA Certified Instructor)

- OSHA 10
- OSHA 30

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

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



Laborers'
International
Union of
North America

LIUNA!

Local No. 1184

March 15, 2018

VIA E-MAIL: david@safetystriping.com, james@safetystriping.com

Local No. 1184
Riverside
and
Imperial
Counties

Safety Striping Service, Inc.
Attn: David Preston
Attn: James Malloy
PO Box 1020
Goshen, CA 93227

RE: Union Letter of Support, Employment Training (ETP Program)

MICHAEL S. DEA
BUSINESS MANAGER

William G. Smith
PRESIDENT

Laborers Local 1184 is supportive of Safety Striping applying for the program. We understand that the California Employment Training Panel (ETP) is a business and labor supported state agency that assists companies in upgrading the skills of their workforce enabling them to remain competitive. The training received under this program will assist Safety Striping to upgrade the skills of their workforce.

MAIN OFFICE

1128 E. La Cadena Drive
Riverside, CA 92507
Telephone: 951-684-1484
Fax: 951-779-1445

THOUSAND PALMS OFFICE

P.O. BOX 155
THOUSAND PALMS, CA 92276
(760) 343-0533
FAX (760) 343-0883
(800) 203-3111

BRAWLEY OFFICE

1644 JONES ST.
BRAWLEY, CA 92227
(760) 351-8923
FAX (760) 351-8947

Sincerely,

Michael S. Dea
Business Manager
Secretary-Treasurer

MSD: cmu

Feel the Power



Northern California Laborers Joint Apprenticeship Training Committee

1001 Westside Drive, San Ramon, CA 94583-4098

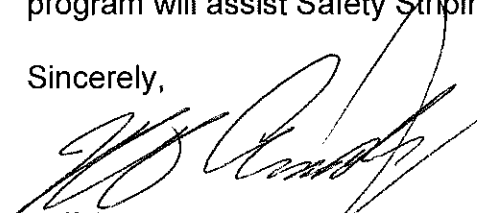
(925) 556-0858 • (925) 828-6142 Fax

March 14, 2018

To Whom It May Concern:

The Northern California Laborers Apprenticeship Program is supportive of Safety Striping Service applying for the program. We understand that the California Employment Training Panel (ETP) is a business and labor supported state agency that assists companies in upgrading the skills of their workforce enabling them to remain competitive. The training received under this program will assist Safety Striping Service to upgrade the skills of their workforce.

Sincerely,



Jeff Armstrong
Director of Apprenticeship



Training Proposal for:
Space Exploration Technologies Corp.
Agreement Number: ET18-0229

Panel Meeting of: May 24, 2018

ETP Regional Office: North Hollywood

Analyst: M. Reeves

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles, Orange, Santa Barbara	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: 5,000	U.S.: 7,000	Worldwide: 7,000
<u>Turnover Rate:</u>	9%		
<u>Managers/Supervisors:</u> (% of total trainees)	17%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$245,700		\$68,552 30%	\$0.00		\$177,148

In-Kind Contribution:	100% of Total ETP Funding Required	\$527,730
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Adv. Technology, Continuous Imp., HAZWOPER, Mgmt. Skills, Mfg. Skills, OSHA 10/30	902	8-200	0	*\$176	\$17.54
				Weighted Avg: 14			
2	Retrainee Priority Rate	Adv. Technology, Continuous Imp., HAZWOPER, Mgmt. Skills, Mfg. Skills, OSHA 10/30	73	8-200	0	\$252	\$16.70
				Weighted Avg: 14			

*Reflects Substantial Contribution

Minimum Wage by County: Job Number 1: \$17.54 per hour for Los Angeles County.
Job Number 2: \$17.54 per hour for Los Angeles County; \$17.50 per hour for Orange County; and \$16.70 per hour for Santa Barbara County.

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

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Numbers 1 and 2		
Technician		445
Engineer I		185
Engineer II		75
Administration/Support Staff		100
Supervisor		90
Manager		80

INTRODUCTION

Space Exploration Technologies Corp. (SpaceX) (www.spacex.com) designs, manufactures and launches advanced rockets and spacecraft. The Company's spacecraft include the Falcon Heavy, Falcon 9, and Dragon. SpaceX has a diverse launch manifest comprised of space station resupply missions, commercial satellite launch missions, and U.S. government science and national security missions.

Founded in 2002, SpaceX is headquartered in Hawthorne. In addition to the headquarters location, the proposed training will also train employees from facilities in Irvine, Placentia, San Pedro, and Vandenberg Air Force Base. SpaceX qualifies for standard ETP funding as a manufacturer.

PROJECT DETAILS

In 2012, SpaceX made history when its Dragon spacecraft delivered cargo to and from the International Space Station (ISS). To date, Dragon has completed multiple ISS cargo resupply missions for NASA. In 2016, NASA awarded SpaceX a contract to provide a minimum of six additional flights from 2019 onward.

As one of the fastest growing providers of launch services, SpaceX has secured over 100 missions to its manifest, representing over \$12 billion in contracts. These include commercial satellite launches, as well as NASA and other government missions. Company growth, emerging technology, and multiple new projects/missions are driving the need for training. SpaceX employees must develop advanced competencies to meet fast-paced demands and stringent production requirements.

SpaceX's previous ETP project featured a broad training plan to assist the Company's effort to add significant automation to its manufacturing processes, as well as train and integrate hundreds of newly hired employees to support planned expansion and repurposing of existing facilities.

This proposal includes a newly developed training plan based on specific group training modules identified by the Company's Training and Development Team. The proposed training is significantly more narrowly defined by range of topics and trainee population than the previous ETP project. The revamped Curriculum is comprised of new subject matter and/or topics that have been updated, so there will be no duplication of training for any trainees who may have participated in the prior Agreement.

Training will take place at SpaceX locations in Hawthorne, Irvine, Placentia, San Pedro, and Vandenberg AFB. Course instruction will be delivered by in-house subject matter experts and vendors identified during the contract term.

Training Plan

Continuous Improvement: Training will be provided to all occupations. Training will focus on Lean manufacturing concepts and process improvements.

Management Skills: Training will be provided to Managers. Training will equip the Company's leadership team with motivation, problem solving, mentoring, and conflict management skills to effectively lead personnel through changes in technology and business processes.

Manufacturing Skills: Training will be provided to Technicians and Engineers. Training will focus on avionics production, engineering tolerances, and process/workflow improvements.

Advanced Technology (AT)

Training will be provided to approximately 140 Technicians and Engineers who work on the Avionics Production floor. These trainees must be skilled to work on rockets, spacecraft, and various intricate component parts. Training topics will include aerospace analysis and advanced engineering. These courses will cover leading technologies in spacecraft manufacturing and rocket science. Training will require the use of in-house specialists and vendors with requisite

expertise. The trainer-to-trainee ratio for this training will be limited to 1:10 to allow for in-depth coverage and personal attention from the instructor.

Certified Safety Training

1. **OSHA 10/30.** This training is a series of courses “bundled” by industry sector and occupation. It consists of 10 hours of classroom or CBT training for Technicians and Engineers and 30 hours for frontline supervisors. The coursework is geared to construction work 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.
2. **Hazardous Waste Operations and Emergency Response Standard (HAZWOPER).** This training is also a series of courses specifically designed for workers who handle hazardous substances as first-responders, or clean-up as needed at a hazard disposal or emergency site. It consists of 40 hours of classroom or CBT training, for workers stationed at the hazard site; and 24 hours for workers who visit the site (e.g., engineers). Field training is also required, although not funded by ETP. Completion of the training results in a certificate that expands employment opportunities. Each certification requires an 8-hour annual refresher course. This coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

Recordkeeping

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

Substantial Contribution

SpaceX is a repeat contractor with payment earned in excess of \$250,000 and a former Substantial Contribution at the 15% level, at the Hawthorne facility within the past five years. Accordingly, reimbursement for trainees at the Hawthorne facility (Job Number 1) will be reduced by 30% to reflect the Company’s \$68,552 Substantial Contribution to the cost of training.

Commitment to Training

SpaceX spends approximately \$1M annually on training for its California facilities. Company-funded training includes technical and non-technical internships, regulatory topics, and basic machine/system operation. Safety training is provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

SpaceX’s Training and Development Manager will oversee the proposed project including course content, scheduling, and LMS tracking/reporting. Human Resources personnel and additional support staff at each location will assist with training coordination and tracking. The project team has formulated a training schedule to accommodate lengthier training sessions that are ready to commence upon approval. SpaceX has also retained an outside administrative consultant to ensure that all training adheres to ETP requirements.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
*ET14-0309	Hawthorne	02/24/14 – 02/23/16	\$1,046,300	\$216,926 (21%)
ET12-0181	Hawthorne	12/31/11 – 12/30/13	\$499,824	\$482,834 (97%)

*ET14-0309: SpaceX representatives report that during the contract term the Company ramped up operations significantly by adding more than 1,500 employees in California and expanded to nearly 30 buildings at its Hawthorne location. This significant expansion occurred quickly during term of the Agreement. The widespread training plan called for front-line participation throughout the state, with an ETP minimum requirement of 24 hours per-trainee at the time. SpaceX representatives indicate this proved to be too time intensive to implement during such rapid company growth. Although SpaceX was able to deliver a sizeable number of training hours overall, only a small percentage of trainees were able to reach the minimum required 24 hours for reimbursement.

This proposed project is much more conservative, lowering the minimum required training hours from 24 to 8, a very manageable and achievable training plan. The Company has reshaped the Curriculum and pared down the scope considerably. The Company will also be utilizing a LMS recordkeeping system to more accurately track training data. Additionally, the funding amount has been right-sized to reflect prior ETP earnings.

DEVELOPMENT SERVICES

Economic Incentives Advisory Group in Phoenix assisted with development for a flat fee of \$10,000.

ADMINISTRATIVE SERVICES

Economic Incentives Advisory Group will also perform administrative services for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 200

Trainees may receive any of the following:

ADVANCED TECHNOLOGY

- Advanced Geometric Dimensioning and Tolerancing (GD&T)
- Aerospace Analysis Boot Camp

CONTINUOUS IMPROVEMENT

- Lean Boot Camp
- Lean Lite

HAZWOPER (OSHA Certified Instructor)

- HAZWOPER 24
- HAZWOPER 8

MANAGEMENT SKILLS (Managers Only)

- Leadership Fundamentals

MANUFACTURING SKILLS

- GD&T Fundamentals
- Avionics Production Qualification
- New Product/Process Introduction

OSHA 10/30 (OSHA Certified Instructor)

- OSHA 10
- OSHA 30

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



RETRAINEE - JOB CREATION

Training Proposal for:

The Honest Company, Inc.

Agreement Number: ET18-0214

Panel Meeting of: May 24, 2018

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:	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: 249	U.S.:436	Worldwide: 437
<u>Turnover Rate:</u>	12%		
<u>Managers/Supervisors:</u> (% of total trainees)	19%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$214,942		\$0	\$0		\$214,942

In-Kind Contribution:	100% of Total ETP Funding Required	\$334,435
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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, Management Skills	189	8-200	0	\$1,098	\$17.54
				Weighted Avg: 61			
2	Retrainee Job Creation Initiative	Business Skills, Computer Skills, Continuous Improvement, Management Skills	7	8-200	0	\$1,060	*\$14.62
				Weighted Avg: 53			

*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: \$17.54 per hour for Los Angeles County.
 Job Number 2 (Job Creation): \$14.62 per hour for Los Angeles County.

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

Used to meet the Post-Retention Wage?: Yes No Maybe
 Up to \$1.59 per hour in Job Number 1 may be used to meet the Post-Retention Wage.

****Commission Bonus:** In addition to their base hourly pay rate of \$15.95, Client Service Representatives (CS Representatives) are eligible to receive a monthly incentive payout based on calls taken, efficiency, and quality. They also have a department-wide revenue goal which can boost their incentive payout but not reduce it. Depending on their level of success across each of these metrics, CS Representatives can earn up to 25% incentive pay for the month. Additionally, representatives who hit the highest set goals ("stretch" goals) for 3 consecutive months receive a spot bonus of \$500 on top of their base pay and incentive earnings.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Manager I		29
Manager II		9
Legal/Human Resource/IT Staff		14
Legal/Human Resource/IT Staff		6

Associate I (Legal/Finance/Research & Development/Lab/Technology)		64
Associate II (Legal/Finance/Research & Development/Lab/Technology)		20
Coordinator		16
**Client Service Representative		31
Job Number 2 (Job Creation)		
Marketing Staff		1
Engineer		4
Operations Staff		1
Associate		1

INTRODUCTION

Founded in 2012, and headquartered in Los Angeles, The Honest Company, Inc. (The Honest Co.) (www.honest.com) manufactures safe and effective products across a wide range of consumer categories that include baby products, personal care, beauty, home care, and vitamins & supplements. The Honest Co.'s products are available across the U.S. via honest.com, honestbeauty.com, and located in more than 17,000 retail locations across North America. This will be the Company's first ETP Agreement. All training provided under this Agreement will take place at the contractor's Los Angeles location.

PROJECT DETAILS

The Honest Co. began as a direct-to-consumer (DTC business model driven through e-commerce and subscription model. To continue company expansion, staff is currently shifting from the DTC business model to Omni-channel (CPG) which will require development and process improvements. CBG business model/marketing strategy seeks to make the customers buying experience seamless, integrating various methods of shopping (phone apps, online, in-store, etc.). The training in this proposal includes curriculum to implement industry-recognized core competencies aligning with the new operating model. Course topics such as Retail Channel Marketing will teach staff new marketing strategies to improve online usage as well as meet consumer needs. In the past, training focused on leadership offered to select staff. Under the new training program, all staff will receive training to increase skills and implement a new training culture.

Training will increase efficiencies and effectiveness, and support retention. Training include Human Resources Programs, Business Acumen, and Management. Business and Continuous Improvement will improve employee communication skills, project development/management, best practices, and presentation skills.

Training Plan

Training will improve change management, communication, effectiveness, and knowledge of business strategies.

Business Skills: Training will be delivered to all occupations to improve employee skills, and introduce staff to The Honest Co.'s new business model. Training will include negotiation and presentation skills, best practices, and process improvement identification.

Management Skills: Training will be delivered to Managers and Supervisors to improve coaching and leadership skills. Training will also equip staff with the abilities to communicate effectively, and motivate frontline staff.

Computer Skills: Training will be delivered to all occupations to improve staff use of Microsoft Office (Intermediate/Advanced). Trainees will learn to utilize functions that can be used to complete and simplify daily tasks.

Continuous Improvement: Training will be delivered to all occupations to increase team building and implement new company practices.

Commitment to Training

The Company will continue to provide Human Resources based training such as new-hire orientation training, as well as computer based training provided via LinkedIn Learning formerly known as Lynda.com.

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 Honest Co. has a detailed training plan in place and is ready to begin training upon Panel approval. The Company's Chief People Officer (CPO) will oversee this program. An HR Business Partner and HR Associate will be responsible for successful implementation and administration of this training project, including scheduling training, running necessary reports, and collection of rosters to provide the consulting team with information for enrollment and data entry. Training will be delivered by In-house subject matter experts. All training provided will be delivered at the contractor's Los Angeles location. The Honest Co. also hired Economic Incentives Advisory Group (EIAG), to provide administration services.

Green/Clean Operations

The Honest Co. involves green practices and products as one of its principles. The Company is a consumer goods company emphasizing non-toxic and eco-friendly household products to supply the marketplace for ethical consumerism. New solutions are being developed in the production process to reduce collective impact, limit harm and create non-toxic, healthy products for sale.

Retrainee - Job Creation

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

The Honest Co. has committed to hiring 7 new employees (Job Number 2). The positions created over the next two years will improve the Company's capacity to manage business growth in an existing function. The Company has become a well-known brand that works to avoid using chemicals of concern. As a result, the Company continues to research ingredients in order to produce non-toxic formulas that meet The Honest Company's green standard. Occupations that will be hired include Engineers, Senior Manager for the beauty line, and a Wholesale Operations Planner. Newly hired employees will help manage company projects and support new brand ideas and current project tasks. 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.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

N/A

PRIOR PROJECTS

N/A

DEVELOPMENT SERVICES

The Honest Co. retained Economic Incentives Advisory Group (EIAG) in Phoenix, AZ to assist with development of this proposal for a flat fee of \$15,000.

ADMINISTRATIVE SERVICES

The Honest Co. also retained EIAG 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

Trainees may receive any of the following:

BUSINESS SKILLS

- Accountability and Affordability Principles
- Building Your Own Brand
- Change Management 101
- Communication Skills and Best Practices
- Competitive Landscape Training
- Finance for Non Finance Employees
- MBTI Training
- Meeting Etiquette
- Negotiations
- Presenting with Confidence (Presentation Skills)
- Process Improvement Identification
- Product Development Lifecycle
- Product Knowledge
- Project Management Essentials/ASPIRE Training
- Resolving Conflicts and Building Resolutions
- Social Media
- Understanding our Core Consumer

COMPUTER SKILLS

- Microsoft Office (Intermediate/Advanced)

CONTINUOUS IMPROVEMENT

- Best Practices
- HR Management Certification (not CEU)
- Setting Effective Goals
- Six Sigma
- Strategic Thinking
- Team Building
- Train the Trainer

MANAGEMENT SKILLS (MANAGERS ONLY)

- Assimilation & Onboarding
- Attract & Retain Your Future Talent
- Building Organizationsl Capacity
- Career Tracks & Career Pathing

- Coaching Skills
- Crafting Individual Development Plans
- Developmental Planning
- First Time Manager Training
- Giving & Receiving Effective Feedback
- Holding Crucial Conversations (Communication Skills)
- How to Manage and Get the Job Done
- Human Capital Planning & Talent Management
- Key Management Skills
- Leadership Skills
- Make Meaning for Your Employees
- Managing a Leave
- Managing the Change Curve
- Provide the Best Employee Experience
- Situational Leadership

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



Training Proposal for:
The SYGMA Network, Inc.
Agreement Number: ET18-0219

Approval Date: May 24, 2018

ETP Regional Office: North Hollywood

Analyst: M. Paccereilli

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Warehousing Transportation/Logistics Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Teamsters Local Union 848; Teamsters Automotive, Industrial and Allied Workers Local Union 495; Teamsters Local Union 630		
Number of Employees in:	CA: 256	U.S.: 256	Worldwide: 51,700
<u>Turnover Rate:</u>	10%		
<u>Managers/Supervisors:</u> (% of total trainees)	20%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$146,448		\$0	\$0		\$146,448

In-Kind Contribution:	100% of Total ETP Funding Required	\$203,400
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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	Cont. Imp., Computer Skills, Business Skills, Comm'l Skills, PL-Comm'l Skills	226	8-200	0-4	\$648	\$17.54
				Weighted Avg: 36			

Minimum Wage by County: \$17.54 in Los Angeles County

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Warehouse Staff		72
Administrative Staff		17
Transportation Staff		110
Maintenance Staff		10
Manager		7
Supervisor		10

INTRODUCTION

The SYGMA Network, Inc. (SYGMA) (www.sygmanetwork.com) 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 Panda Express, Panera Bread, Wing Stop, Einstein, Checker Rally's, Jenny Craig and Fire House Subs.

The proposed training will be provided to employees at SYGMA's Lancaster facility. This will be SYGMA's second ETP Agreement for the Lancaster facility and the third in the last five years for all facilities.

PROJECT DETAILS

In its prior ETP project, SYGMA expanded the use of Internet technology and moved to a paperless operation. In this new proposal, training will focus mainly on the implementation of new equipment and technology. The Company will also train employees on processes and customer service. Some curriculum courses are repeated from the prior Agreement; however, there will be no repeat trainees in those courses. With ETP funds, SYGMA will be able to expand the scope of training to a larger trainee population.

The food distribution industry is growing quickly and is highly competitive. To keep pace with the industry, SYGMA has invested in new equipment and technology such as Cuba Scanner, Driver Onboard Technology, and Wireless Tables for its Lancaster warehouse. The Company also upgraded devices in every department. Training will allow employees to learn all aspects of the equipment, from maintenance to use.

Training Plan

Business Skills - Training will be provided to all occupations focusing on operating procedures, time management, category management, and customer service.

Computer Skills - Training will be provided to all occupations on current applications and new software technology.

Continuous Improvement - Training will be provided to all occupations in SYGMA Quality Standards and Food Safety to improve service quality and customer satisfaction.

Commercial Skills - Training will be provided to Warehouse, Transportation and Maintenance Staff on SYGMA's new equipment and best practices vital to serving its customers accurately and efficiently.

Productive Laboratory (PL)

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

PL in Commercial Skills will be offered to Warehouse, Maintenance, and Transportation Staff in equipment operation consisting of balers, electric pallet jacks, forklift, scissor lifts, scrubbers, sweepers, trailers, and tractors.

Trainees will be provided with operating procedures and instruction on the equipment. Trainees will then learn to diagnose and repair machinery by observing and shadowing the trainer and completing supervised assignments. Each PL session is structured around specific skills trainees must learn. Trainees are evaluated on knowledge, skill, and proficiency. After the successful completion of a training course, the trainer will certify competency for each skill before trainees are allowed to work independently. Although PL will average 40 hours per trainee, some trainees will require more hours based on job duties. PL will not exceed 60 hours per trainee.

PL training will take place on site, and the Company is requesting a trainer-to-trainee ratio of 1:3 due to the limited number of equipment. As most equipment is in constant use, it is necessary to optimize the trainer and trainee's time when the equipment is available. Trainers will be in-house staff and subject-matter experts with at least two years of experience in equipment operation.

Computer-Based Training

Some training will also be delivered in a Computer-Based Training (CBT) setting. CBT will serve as a supplement to the class/lab training either as a prerequisite or as a follow-up to ensure competency.

Union Support

The proposed training is supported by the Teamsters Automotive, Industrial & Allied Workers Local 495 representing the Maintenance staff; Teamsters Local Union 848 representing the Transportation staff; and Teamsters Local Union 630 representing the Warehouse Staff. Letters of support have been provided to ETP.

Commitment to Training

The Company's current annual training budget is approximately \$1M for OSHA-mandated training, new-hire orientation, defensive driver training, sexual harassment prevention, ethics training, ergonomics, and environmental and on-the-job training.

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

➤ Training Infrastructure

SYGMA's Human Resources Manager and Training Specialist will oversee training and project administration. These staff successfully administered the prior ETP project. Training will be provided by dedicated in-house trainers and subject-matter experts.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0453*	Lancaster	05/10/2016– 05/09/2018	\$135,864	\$135,864 (100%)
ET16-0394**	Stockton	03/02/2016 – 03/01/2018	\$88,780	\$65,484 (74%)

*ET16-0453 (Lancaster): All training was completed on 02/08/18. Based on the ETP Systems, 8,751 reimbursable hours have been tracked with projected earnings of \$135,864 (100% of approved amount). SYGMA will be submitting a Final Closeout Invoice at the end of the contract term when all trainee retentions have been completed.

**ET16-0394 (Stockton): The ETP Online System indicates 3,595 reimbursable hours have been recorded with projected earnings of \$65,484 (74% of approved amount). A final closeout Invoice has not yet been submitted.

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

- Category Management
- Handling Difficult Customers
- Customer Improved Satisfaction
- Operating Procedures
- Putting the Customer First
- Time Management
- Avoiding Conflict of Interest

COMPUTER SKILLS

- Microsoft Office (Advanced & Intermediate)
- XATA Onboard Truck Software
- Cuba Scan
- Computerized Inventory
- Contact Management
- Laptop Techniques
- Mobile Scanners
- Smartphone Applications
- SYGMA Desktop Applications
- Tablet Applications
- Wearable Computer Terminals

COMMERCIAL SKILLS

- Best Practices
- Building Customer Orders
- Diagnosing Electrical System Problems
- Diagnosing Fuel Cells System Problems
- Order Selection Procedures
- Repair Computer Controlled Systems
- Preferred Work Methods

CONTINUOUS IMPROVEMENT

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

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
- Sweeper
- SYGMA Labeling Systems
- Tractor
- Trailers
- Wearable Computer Terminals

CBT Hours

0-4

COMPUTER SKILLS

- Microsoft Excel II (1 hour)
- Microsoft Word III (2 hours)
- Microsoft PowerPoint (1 hour)

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



*Wholesale Delivery Drivers, General Truck
Drivers, Chauffeurs, Warehouse, Sales,
Industrial and Allied Workers*

AFFILIATED WITH THE INTERNATIONAL BROTHERHOOD OF TEAMSTERS

ERIC TATE
SECRETARY-TREASURER

April 17, 2018

Employment Training Panel
1100 "J" Street
Sacramento, CA 95814

Re: Sygma Network, Inc.
Lancaster, CA

Teamsters Union Local 848 supports the proposed Sygma Network, Inc. Employment Training Panel Project.

Sincerely,

A handwritten signature in black ink, appearing to read "Ralph Black". The signature is fluid and cursive, with a long horizontal stroke extending to the right.

Ralph Black
Business Representative
Teamsters Union Local 848



TEAMSTERS LOCAL UNION No. 495

*Automotive, Industrial, Theme Park,
Service Sector and Allied Workers*

PROTECTING THE RIGHTS OF MEMBERS SINCE 1939

R.M. "BOB" LENNOX
Secretary-Treasurer

GEORGE PARK
President

April 13, 2018

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

Re: The Sygma Network, Inc. Employment Training Panel

This letter is to confirm the support of Teamsters Local 495 for The Sygma Network, Inc, Employment Training Panel (ETP) project.

Sincerely,

**TEAMSTERS AUTOMOTIVE, INDUSTRIAL
AND ALLIED WORKERS LOCAL NO. 495**

George A. Park
President

GAP:pl

Lou Villalvazo
Secretary-Treasurer



Frank Afoa
President

April 17, 2018

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

Re: **Syigma Network Lancaster, Inc Employment Training Panel Project**

To Whom it may concern,

Teamsters Local Union 630 supports the proposed Syigma Network Lancaster, Inc. Employment Training Panel (ETP) project.

Sincerely,

Alfredo Salazar
Divisional Representative
Teamsters Local 630



**TRAINING PROPOSAL FOR
Triumph Aerostructures, LLC
17-0761**

Panel Meeting Date: 05/24/2018
Regional Office: North Hollywood Regional Office
Analyst Name: Stephen Reeves
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 235,872.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 235,872.00	N/A	\$ 0.00	\$ 327,600.00

APPLICANT PROFILE

Company Summary	Triumph Aerostructures, LLC (Triumph) designs, engineers, manufactures, repairs, and overhauls a broad portfolio of aviation and industrial components, accessories, subassemblies, systems, and aircraft structures.
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Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 1589	US: 11229	World Wide: 14602
Turnover Rate (Applicant)	16.00 %		
Repeat Contractor	No		
High Unemployment Area	Yes		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Training will ensure employee obtain skills needed to support all levels of Triumph's demanding fabrication and repair processes.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	336	\$ 18.00	39	\$ 702	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1993, Triumph manufactures close-tolerance parts built to customer specifications and model-based definition at all levels of the aerospace supply chain - from single components, to complex systems and aerospace structures and their contents. The Company's products and services encompass the entire life cycle of an aircraft - from raw material to aftermarket service. Triumph's parent company, Triumph Group, is headquartered in Pennsylvania. This proposal targets two California locations: Valencia and El Cajon.

2. Current Training Project Details

Purpose of Training	<p>Due to the high quality standards associated with the aerospace industry, Triumph must ensure that its employees have the requisite knowledge and skills to execute and support the Company's manufacturing methods. Production-related training will focus on various fabrication techniques (stretching, cold/hot forming), the use of large machinery (titanium welding), and hazardous materials skills. Trainees will also receive training on the Company's enterprise resource planning system, SysteLine ERP. Training will increase customer satisfaction and operational efficiency by improving manufacturing processes, product quality, and delivery time, while reducing production errors and waste.</p> <p>Training will take place at the Company's facilities in Valencia and El Cajon. Course instruction will be provided by in-house subject-matter experts.</p>
Training Infrastructure and Administrative Plan	<p>The Company's Transformation Manager will oversee training and administration. Human Resource personnel at each facility will coordinate the planning, scheduling, and tracking of training with department managers. Triumph has also retained an outside administrative consultant to ensure that all training records adhere to ETP requirements.</p>
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

PROPOSED TRAINING PROJECT DETAILS

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All trainees will receive Computer Skills. Machinists, Mechanics, Engineers, Technicians, Supervisors, and Managers will receive Hazardous Materials Skills training. Production-related trainees (Assemblers, Engineers, Finishers, Machine Operators, Machinists, Technicians, and Mechanics) will receive Manufacturing Skills.	

Delivery Method/Level	E-Learning - Instructor Led/Distance Learning
Summary	
All trainees will receive Business Skills training.	

4. Additional Company or Training Project Details

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

Certified Safety Training

Hazardous Waste Operations and Emergency Response Standard (HAZWOPER). This training is a series of courses specifically designed for workers who handle hazardous substances as first-responders, or clean-up as needed at a hazard disposal or emergency site. It consists of 40 hours of classroom training or CBT, for workers stationed at the hazard site; and 24 hours for workers who visit the site (e.g., engineers). Completion of the training results in a certificate that expands employment opportunities. Each certification requires an 8-hour annual refresher course. This coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA. Triumph represents that trainees will not receive 40 hours unless they work full time onsite at the clean-up location.

4.1 Program Waivers

N/A

PROPOSED TRAINING PROJECT DETAILS

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Incentives Management Group	West Hollywood	\$ 14,000.00
Administrative	Incentives Management Group	West Hollywood	Not to exceed 13.00% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Computer Skills (Standard)	Syteline ERP
	Syteline ERP - super user
Hazardous Materials Skills	Hazwoper
Manufacturing Skills (ME) (Standard)	Heat Treat
	Processing
	Visual Weld

<i>Delivery Method /Level</i>	<i>E-Learning – Instructor Led/Distance Learning</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Reporting and Documentation/Time Charging



RETRAINEE - JOB CREATION

Training Proposal for:

Ultimate Formulations, Inc. dba Best Formulations

Agreement Number: ET18-0215

Panel Meeting of: May 24, 2018

ETP Regional Office: North Hollywood

Analyst: M. Webb

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative Veterans	Industry Sector(s):	Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 300	U.S.: 300	Worldwide: 300
<u>Turnover Rate:</u>	15%		
<u>Managers/Supervisors:</u> (% of total trainees)	14%		

FUNDING DETAIL

<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">Program Costs</td></tr> <tr><td style="text-align: center;">\$120,400</td></tr> </table>	Program Costs	\$120,400	-	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">(Substantial Contribution)</td></tr> <tr><td style="text-align: center;">\$14,040 (15% Job 1)</td></tr> </table>	(Substantial Contribution)	\$14,040 (15% Job 1)	=	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">(High Earner Reduction)</td></tr> <tr><td style="text-align: center;">\$0</td></tr> </table>	(High Earner Reduction)	\$0	=	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">Total ETP Funding</td></tr> <tr><td style="text-align: center;">\$106,360</td></tr> </table>	Total ETP Funding	\$106,360
Program Costs														
\$120,400														
(Substantial Contribution)														
\$14,040 (15% Job 1)														
(High Earner Reduction)														
\$0														
Total ETP Funding														
\$106,360														

In-Kind Contribution:	100% of Total ETP Funding Required	\$125,827
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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, Mfg. Skills, PL-Mfg. Skills	130	8-200	0	**\$612	\$17.54
				Weighted Avg: 40			
2	Retrainee Priority Rate Job Creation	Business Skills, Computer Skills, Cont. Imp., HazMat, Mfg. Skills, PL-Mfg. Skills -PL	30	8-200	0	\$600	*\$14.62
				Weighted Avg: 30			
3	Retrainee Priority Rate Veterans	Business Skills, Computer Skills, Cont. Imp., HazMat, Mfg. Skills, PL-Mfg. Skills	10	8-200	0	\$880	\$17.54
				Weighted Avg: 40			

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

**Reflects Substantial Contribution

Minimum Wage by County: Job Numbers 1 and 3(Veterans): \$17.54 per hour in Los Angeles County. Job Number 2 (Job Creation): \$14.62 per hour in Los Angeles County.

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Production Staff		61
Technical/Quality Staff		35
Administration Staff		14
Supervisor/Manager		20
Job Number 2 (Job Creation)		
Production Staff		20
Technical/Quality Staff		5
Administration Staff		3
Supervisor/Manager		2

Job Number 3 (Veterans)		
Production Staff		5
Technical/Quality Staff		2
Administration Staff		2
Supervisor/Manager		1

INTRODUCTION

Founded in 1984 and located in the City of Industry, Ultimate Formulations, Inc. dba Best Formulations (Best Formulations) (www.bestformulations.com) is a manufacturer and private labeler of nutritional supplements which include tablets, soft gels, powders, capsules, dietary teas and over-the-counter and prescription drugs.

PROJECT DETAILS

This will be Best Formulations fifth ETP Agreement, and third within the last five years. Training provided under prior ETP Agreements included new equipment operation. Training in this proposal will include new machinery and handling, manufacturing and consumption regulations. Trainees will participate in training to implement management systems such as Therapeutic Goods Administration and Hazard Analysis Critical Control Point to prevent hazards and unsafe handling of food products. No trainee will receive duplicate training under this proposal.

Best Formulations continues to purchase new equipment to ensure they can offer more packaging options to customers. Recently, the Company spent approximately \$1.5 million on new machinery and computer software programs. New machinery includes additional vegetarian softgel encapsulation machinery, vegetarian softgel formulas, tablet integration with in-house apps, network security, and software such as RedZone and Office365.

In a manufacturing environment, overall operational effectiveness (OEE) is a key metric to help companies determine manufacturing efficiency. Staff will receive training on Redzone software to determine root causes for ineffectiveness and improve communication between functional departments. Trainees will learn to leverage OEE with three major components: performance, availability, and quality. Once the system collects data in each component, staff will use this data to determine root causes and improve overall efficiency.

To enhance the stability of IT infrastructure, the Company will replace aged servers and storage units to a new server, virtualization solutions, and Storage Area Network Units (SAN). Technical training will be provided to staff to support project implementation. User training sessions will also be provided to guide employees and teach new settings, navigate new interfaces, and safe work practices to safeguard data.

To remain competitive and continue company growth, Best Formulations has developed new formulas that include tapioca starch (non-animal). To maintain quality and consistency, Production Staff will learn the differences between tapioca and carrageenan bases, pouching, and new steps involved in the manufacturing process (setup, operation, troubleshooting, routine maintenance, tooling, design/care).

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.

Best Formulations has committed to hiring 30 new employees (Job Number 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract. Newly hired workers will staff new production shifts created by additional machinery purchased by the Company. Manufacturing Skills training will ensure workers can execute job duties thoroughly utilizing equipment for packaging and encapsulation. Staff will also receive training in Business, Computer, and Continuous Improvement to learn how to use computer software programs and company procedures.

Substantial Contribution requirement is not applicable for Job Creation (Job Number 2).

Training Plan

Training will be delivered via class/lab and Productive Lab (PL) in the following:

Business Skills: Training will be offered to all occupations to increase employee skills in marketing, customer relations, and conflict resolution.

Hazardous Materials: Training will be offered to Production Staff, Technical Staff, and Managers and Supervisors. 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.

Computer Skills: Training will be offered to all occupations to improve computer software usage across all business departments. Trainees will learn how to utilize Office365 (intermediate/Advanced), business intelligence app, and new upgrades purchased in Windows 10 software.

Manufacturing Skills: Training will be offered to Production Staff, Technical Staff, and Managers and Supervisors. Trainees will learn how to operate new equipment and cross-train to ensure staff can run various machinery independently.

Continuous Improvement: Training will be offered to all occupations to enhance staff's ability to implement preventive processes that will reduce re-work and waste accumulated in the production process.

Productive Laboratory

Trainees may produce goods for profit as part of the PL-Manufacturing Skills training in the courses identified under the Curriculum. The instructor must be dedicated to training delivery during all hours of training. Trainer-to-trainee ratio is 1:1.

To improve efficiency, reduce costs, and improve turnaround times, Best Formulations will provide PL training. The Company will train 72 workers on various production machines that include encapsulation, tableting presses, inspection equipment, pill pouching lines, and other laboratory equipment. Trainees will be assigned a tasks based on job requirements once classroom training is completed. Trainees will produce products, following production procedures that will be discussed with a qualified instructor prior to PL training.

Under the direct supervision of an instructor, trainees will complete batches to ensure instructions are followed, and provide immediate feedback to the trainee as the work is performed.

Commitment to Training

Best Formulations spends approximately \$95,000 annually in training in safety, new hire, and on-the job training as needed.

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 Human Resources Generalist will manage and oversee all administrative duties. The assigned HR representative has successfully managed prior ETP Agreements and is familiar with ETP record keeping and training requirements. Training Funding Source (TFS) has also been retained to assist with enrollment, data entry, roster collection, and training schedules are completed.

Substantial Contribution

Best Formulations is a repeat contractor with payment earned in excess of \$250,000 at the City of Industry facility within the past five years. (See Prior Project Table.) Accordingly, reimbursement for trainees in Job Number 1 will be reduced by 15% to reflect the Company's \$14,040 Substantial Contribution to the cost of training.

Temporary to Permanent Hiring

Best Formulations will train 30 workers (Job Number 2) under Panel guidelines for the Temporary-to-Permanent program. The Company has retained these employees on a temporary basis, with the intention of hiring them into full-time, permanent positions after training. According to Best Formulations the average time for "converting" temporary workers into full-time permanent employment is between 3-4 months. These workers will receive employer-paid share-of-cost for healthcare premiums while on temporary status.

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 Best Formulations into full-time, permanent employment. Until they are hired, retention and post-retention wage requirements cannot be satisfied and the Company will not receive progress payments.

Veterans Program

The Panel has established a higher reimbursement rate and other incentives for training California veterans. The Company has committed to training 10 Veterans (Job Number 3).

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0325	City of Industry	12/31/15- 12/30/17	\$93,600	\$88,976 (95%)
ET15-0120	City of Industry	07/01/14- 06/30/16	\$110,040	\$110,040 (100%)
ET12-0385	City of Industry	05/11/12- 05/10/14	\$97,308	\$96,845 (99%)

DEVELOPMENT SERVICES

TFS in Seal Beach assisted with development for a flat fee of \$5,900.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

N/A

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

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- Building Relationships
- Consensus Building
- Customer Relations
- Inventory Management
- Management through Conflict
- Marketing Intelligence
- Operating Guidelines
- Personal Development
- SMART Goals

COMPUTER SKILLS

- Business Intelligence App
- Cloud Computing
- Data Integrity
- Information Security
- Office 365 Enhancement
- Tablet OPS Workflow
- Windows 10 Enhancement

CONTINUOUS IMPROVEMENT

- 5 Whys
- Building Maintenance
- Coaching Skills
- Customer Visits
- DISC Profile
- Equipment Preventative Maintenance
- Fishbone Diagrams
- Good Documentation Practices
- Overall Equipment Efficiency
- RedZone System

HAZARDOUS MATERIALS

- Cleaning Chemicals
- Hazard Communications
- Hazard Symbols
- HazWoper

MANUFACTURING SKILLS

- Compounding Machines
- Current Good Manufacturing Practices
- Encapsulation/Compression Machines
- Facility Cleanliness

- Packaging Machines
- Verisym Machine

Productive Lab Hours

0-25

MANUFACTURING SKILLS (Ratio 1:1)

- Equipment Validation
- Gas Chromatograph Mass Spectrometer
- Good Laboratory Practices
- Inductively Coupled Plasma Mass Spectrometer
- Method Development
- Micro Testing
- Process Validation

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



RETRAINEE - JOB CREATION

Training Proposal for:

VCI Construction, LLC

Agreement Number: ET18-0210

Panel Meeting of: May 24, 2018

ETP Regional Office: San Diego

Analyst: H. Bernard

PROJECT PROFILE

Contract Attributes:	SET Priority Rate Job Creation Initiative	Industry Sector(s):	Construction Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Bernardino, Los Angeles, 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: 279	U.S.: 349	Worldwide: 349
<u>Turnover Rate:</u>	5%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$166,800		\$0	\$0		\$166,800

In-Kind Contribution:	100% of Total ETP Funding Required	\$174,270
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET Priority Rate	Business Skills, Commercial Skills, Computer Skills, HazMat., PL - Commerical Skills	65	8 - 200	0	\$720	\$22.77
				Weighted Avg: 40			
2	Retrainee SET Priority Rate Job Creation Initiative	Business Skills, Commercial Skills, Computer Skills, HazMat., PL - Commerical Skills	100	8 - 200	0	\$1,200	*\$13.66
				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.

Minimum Wage by County: Job Number 1 Retrainee: \$22.77 Statewide; Job Number 2 Retrainee Job Creation: \$13.66 in San Bernardino County; \$14.62 in Los Angeles County; \$14.19 in San Diego County
Health Benefits: Yes No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: Yes No Maybe
 Up to \$1.20 per hour may be used to meet the Post-Retention Wage in Job Number 1 & \$0.96 per hour may be used to meet the Post-Retention Wage in Job Number 2.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1 Retrainee		
Aerial Lineman		14
Ground Men		24
Drill Operator		1
Drill Support Crew		8
Driver		2
Tower Technician		2
Fiber Splicers		4
Foreman		10
Job Number 2 Retrainee Job Creation		
Aerial Lineman		14
Ground Men		30

Drill Operator		2
Drill Support Crew		30
Driver		8
Tower Technician		4
Fiber Splicers		2
Foreman		8
Warehouse/Inventory Control		2

INTRODUCTION

VCI Construction, LLC (VCI) (www.vcicom.com), is headquartered in Upland with additional locations in San Lorenzo, Sun Valley, San Marcos and Las Vegas. VCI is a full service construction contractor specializing in telecommunications services and utility construction. The Company's Sun Valley and San Marcos locations will participate in training. This will be VCI's first ETP project.

VCI's customers include providers of telecommunications services such as internet, telephone, television and wireless services to the public. The construction services provided by VCI range from engineering, basic maintenance, major damage restorations, systems improvements to the wireless systems of its customers. VCI also provides extensive placement of fiber optic cables, telephone poles, underground pipes, cellular phone towers and underground substructures. The company's customers include Verizon, Nokia, AT&T, Spectrum Communications and Southern California Edison.

PROJECT DETAILS

The Company is in a period of growth due an increase in customer demands. Increases in cellular usage, internet usage and bandwidth usage has increased 6000% in the last 5 years and is expected to double in the next 2 years. As a result, VCI's customers have a significant need for additional infrastructure including new fiber optic lines and upgrades to cell towers to meet the demands for the telecommunications services. VCI's customer, Verizon, will be aggressively upgrading their systems in the next 4 years and has committed to running 6,700 miles of new fiber optics in Southern California. This will create a 40% increase in revenue and staffing for VCI. As a result, VCI expects to hire up to 150 new field staff in the next year to accommodate customer needs.

As VCI begins to increase staffing to meet the industry needs, it has found that there is a shortage of qualified telecommunications workers. As such, when new staff are hired, they require extensive training before they are able to work independently in the field. In addition, the Company will be upgrading the skills of some of its incumbent workforce in an attempt to elevate staff into leadership roles.

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.

As part of its aforementioned hiring projections, VCI has committed to hiring 100 net new employees (Job Number 2) to keep up with customer needs and expected growth. These trainees will receive an average of 60 hours of training to ensure they can operate independently in the

field. New-hires include all field staff across the spectrum, however, the bulk of new staff will be Ground Men and Drill Support Crew staff. These staff are integral to the Company's success in the coming year as it will be required to provide more manpower on the ground to maintain and implement new telecommunications technology for its customers. The Company has also made significant investments in new equipment including two new drill rigs, new climbing gear for tower technicians, fiber optic equipment and various specialty aerial construction vehicles, all of which require training. VCI has invested approximately \$2.2 Million in new equipment and expects to spend up to \$1.5 Million more in the next year.

To be eligible for reimbursement trainees must be hired within the three-month period prior to Panel approval or during the term of contract. 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.

Special Employment Training

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

Training Plan

Training will be delivered via classroom/laboratory and productive lab (PL) methodologies. Most of the training will occur at the Company's Upland location, however PL training will occur at the job sites as needed in Southern California.

The primary focus of training will be to ensure that all newly hired and incumbent staff are fully trained in commercial skills. This will include training on new equipment as well as construction specifications required when building and maintaining communications systems. The Company will focus on aerial construction, equipment operation, fiber testing, wireless tower climbing, underground construction and confined spaces. Training will also be provided in business skills, particularly for incumbent workers as VCI works to promote members of its current workforce into leadership roles. Training will be conducted as follows:

Business Skills: Leadership Skills, Project Management, Goal Setting, Conflict Resolution, and Production Reporting.

Commercial Skills: Utility Clearances, Construction Specifications, and Cable Specifications

Computer Skills: Construction Software Programs.

Hazardous Materials: Hazardous Substances in operations, Hazardous substances Proper Disposal, Proper Water Ratios, Environmental Protection Agency (EPA) Disposal Requirements, Hazardous Materials Manifestation.

Productive Laboratory (PL)

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 is necessary to ensure safety and construction standards are being met. Training will be at much slower pace than regular work and is expected to reduce job completion rates by at least 50% as trainees work with instructors to gain proficiency. PL Training will be provided in aerial and underground construction and will include hardware identification and installation,

system anchoring requirements, grounding specification, underground utility identification, conduit radius specifications and conduit depth specifications.

VCI expects to train all of the trainees under this project in PL, with a focus on training for the Aerial Lineman and Drill Support Crew, who will require more PL training than other occupations. Total number of PL hours will vary by occupation from 15-60 hours. Training will be provided by subject matter experts with over 15 years of experience and competency in all topics.

Most of VCI's field staff are assigned to three-man crews while working in the field. As such, the Company is requesting a PL trainer to trainee ratio of 1:3. This increased ratio will allow the Company to provide effective training on job specific functions within the structure in which work is performed.

Safety Training Cap Request

ETP's regulation states that the Panel may fund training that is directly related to a piece of equipment or process recently acquired, or that an employee is not familiar with. However, this training cannot exceed 10% of the total training hours per trainee, except with prior written approval upon a showing of good cause. VCI is requesting the safety training cap be increased from 10% to 20%. VCI's recently acquired equipment will require significant training for all staff under the project. In addition, the nature of the Company's work and its equipment are extremely high risk in nature and require additional time and training to ensure workers have retrained and implement safe practices and procedures.

Commitment to Training

VCI spends \$180,000 annually on training which includes on-the-job training and classroom training in installation maintenance & repair and directional drilling provided as needed.

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 project will be overseen at the headquarters in Upland by the Human Resources Director and the Safety Manager. These staff members will oversee the scheduling of training, enrolling and tracking trainees' hours and work with the San Marcos and Sun Valley locations to ensure accurate completion and submittal of ETP documents. In addition, RSM US LLP has been retained to assist VCI with the administration of the project. VCI plans to utilize both internal and external training vendors during the term of the project.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

N/A

PRIOR PROJECTS

N/A

DEVELOPMENT SERVICES

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

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

Ditch Witch of Corona has been retained to provide Equipment Operations and Maintenance training a fee of \$2,495. Other trainers will be identified for ETP record-keeping purposes, as they are retained by VCI.

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

8 – 200

Trainees may receive any of the following:

BUSINESS SKILLS

- Project Management
- Product Knowledge
- Communication skills
- Goal Setting
- Risk Management
- City Permitting
- Leadership Skills
- Conflict Resolution
- Customer Relation Skills
- Production Reporting
- Inventory Procedures
- Leadership Skills
- Team Building

COMMERCIAL SKILLS***Aerial Construction-Lineman and Ground men2q2qq***

- Pole Climbing
- Hazard Analysis
- Gear Inspection
- Electrical Safety
- Rubber (Dielectric) Protection
- Hazard Identification
- Arc Flash
- Fire Rated (FR) Clothing

Equipment Operation

- Aerial Lifts
- Rigging and Signaling
- Lifting Device Capacities
- Load Specifications
- Rated Capacities
- Pressures Generated by Equipment

Fiber Testing – Fiber Splicers

- Fiber and Connector Types
- Fusion Splicing for Fiber
- Multiple Wire Fusion Machines
- Proper Installation and Testing Techniques
- Required Customer Certifications

Wireless Tower Climbing- Tower Technicians

- Site Inspection

- Hazard Analysis
- Knot Specifications
- Capstan Operations
- Controlled Decent
- Climber Rescue
- Radio Frequency (RF)
- RF Warning Signage
- RF Monitoring

Underground Construction

- Soils Geology
- Hazard Analysis
- Protective Systems
- Equipment Selection
- Excavation Specifications
- Minimum Cover
- Damage Prevention
- Existing Utility Identification

Equipment Operation

- Directional Drill Specifications
- Machine Limitations
- Required Daily Maintenance
- Pedestrian Safety Requirements
- Air (Pneumatic) Tool Operation
- Utility Locating Equipment
- Rated Pulling Strengths
- Rigging Failure Identification
- Rigging Failure Protection.

Confined Spaces

- Classification of Space Procedures
- Required Equipment
- Water Quality Identification
- Water Removal Procedures
- Unsafe Practices
- Entrant/Attendant Requirements

Commercial Driver

- Vehicle Weight Capacities(GVWR)
- Hours of Service Requirements
- Cargo Securement
- Towing Capacities
- Advanced Construction Techniques
- Advanced Equipment
- Aerial Bucket Trucks
- Directional Drill
- Pole Climbing
- Electrical Safety
- Fall Protection Equipment

- Approach Distances to Electricity

COMPUTER SKILLS

- Customer Information Systems
- Construction Plan Viewer
- Field Audit Software Program

HAZARDOUS MATERIALS

- Hazardous Substances in operations.
- Hazardous Substances Proper Disposal.
- Proper Water Ratios
- Environmental Protection Agency (EPA) Disposal Requirements
- Hazardous Materials Manifestation

Productive Lab Hours (PL)

0 – 60

PL - Commercial Skills (limited ratio 1:3)

Aerial Training

- Utility Clearances
- Hardware Identification
- Hardware Installation
- Strength Requirements
- Tension Specifications
- System Anchoring Requirements
- Grounding Specifications
- Wood Pole Specifications
- Crossing Railroads
- Weight Limitations
- Cable Radius Limitations
- Climbing Space
- Pole Placement
- Rubber (Dielectric) Protection
- Hazard Identification/Abatement
- Insulator Specifications
- Accessing Electrical Towers
- Fire Rated Clothing (FR)
- Man Lift Specifications

Underground Construction

- Utility Clearances
- Structure Installation
- Underground Utility Identification
- Equipment Maintenance
- Ground/Bond Specifications
- Conduit Radius Specifications
- Shared/Joint Trench Requirements
- Conduit Depth Specifications
- Structure Grading Specifications
- Multiple Conduit Installation

- Protection of Installed Facilities
- Protection of Existing Facilities
- Equipment Pulling Tensions
- Rigging Failure Protections
- Cable Protection Best Practices
- Required Separation of Utilities

Safety Training cannot exceed 20% 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
Western Digital Corporation
18-0526**

Panel Meeting Date: 05/24/2018
Regional Office: San Diego Regional Office
Analyst Name: C. Clady
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 157,300.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 170,800.00	N/A	\$ 13,500.00	\$ 983,000.00

APPLICANT PROFILE

Company Summary	Western Digital Corporation (WDC) designs, manufactures and sells high-performance hard disks, solid-state drives, and other consumer electronics. WDC is the largest traditional hard drive manufacturer in the world. Customers include major personal computer manufacturers, retailers, and distributors.		
Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 6,589	US: 7,400	World Wide: 68,000
Turnover Rate (Applicant)	8.00 %		
Repeat Contractor	Yes		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	WDC plans to implement new technologies which requires training. The Company will provide workers with Business, Computer, and Manufacturing Skills training to improve efficiencies necessary to remain competitive within the industry.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee*	Min-Max Hours
1	Retrainee	675	\$ 18.00	12	\$ 216	8 - 200
2	Job Creation – Retrainee Initiative Program, Retrainee	25	\$ 20.00	50	\$ 1000	8 - 200

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

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1970, and headquartered in San Jose, Western Digital Corporation (WDC) (www.wdc.com) is a leader in the data storage industry. The Company offers performance hard disk drives used in enterprise servers, data analysis, and enterprise solid state drives designed to enhance the performance in various workload environments. Both types of disk drives are embedded into external storage products; removable cards for use in mobile phones, tablets, imaging systems, still cameras, action videos, and security surveillance systems.

Customers include: Amazon, Best Buy, Dell, Sony, Staples, Target, Office Depot, and Hewlett Packard.

2. Current Training Project Details

Purpose of Training	<p>This will be WDC's sixth project, the third in the last five years. WDC will be the lead primary contract holder (Irvine, San Jose, and Fremont) with six of its affiliates comprising of a total of 10 facilities where training will be conducted:</p> <ul style="list-style-type: none">• Western Digital Technologies Inc. (Fremont),• Sandisk Manufacturing Americas, LLC (Milpitas),• Tegile Systems, Inc. (Newark),• Upthere, Inc. (Redwood City),• WD Media, LLC (San Jose), and• HGST, Inc. (San Jose & San Diego) <p>Training will also be conducted at all locations. Training will focus on the integration of WDC's newly acquired products and technologies, customer service and sales. WDC acquired new companies and will add new product lines requiring incorporation of all platforms to work together and easily capture company and personal data. It is critical that WDC and all its affiliates be trained to ensure employees are receiving essential innovative software updates in order to meet customer service demands.</p> <p>Some of the training curriculum will be repeated from prior ETP Agreements to train employees who were not able to participate.</p> <p>In order to help promote innovation, WDC will train employees on New Product Development, Data Migration, Mobile Development, Operation, and Digital Commerce.</p>
Training Infrastructure and Administrative Plan	<p>The Senior Training Coordinator will oversee the project, schedule classes and collect rosters for all sites. Staff will be available at each location to help coordinate training. National Training Company has been hired to provide ETP administrative support. Training will be provided by in-house trainers and a vendor to be determined later.</p>

PROPOSED TRAINING PROJECT DETAILS

Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	<p>WDC is a repeat contractor with payment earned in excess of \$250,000 with former Substantial Contributions at the 50% level at the Irvine and Fremont facilities within the past five years (see active and prior project tables). Accordingly, reimbursement for incumbent trainees at these facilities (Irvine and Fremont) will be reduced by 50% to reflect the Company's \$13,500 Substantial Contribution to the cost of training (Group 1).</p> <p>The other 10 facilities participating in the proposed project are either first time participants or have not earned more than \$250,000.00 in the last 5 years at those respective facilities.</p>

3. Curriculum Summary

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

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

Delivery Method/Level	Productive Laboratory
Summary	
Production Staff will receive PL-Manufacturing Skills	

4. Additional Company or Training Project Details

Retrainee- Job Creation

WDC has committed to hiring 25 full-time workers (Group Number 2) to support its market and business expansion of recently launched products and those currently under development. These employees will require extensive training to develop requisite skills to support the design and manufacture of these products.

WDC is expanding existing business capacity by adding newly-hired employees to an existing function. The Company is part of the worldwide expansion to move data to smartphones, tablets, computer systems, and the cloud. WDC supplies the storage for all these devices. As digitization of information expands, the Company grows. WDC will grow its workforce in response to increased global demand. This has created the need to add newly-hired employees.

PROPOSED TRAINING PROJECT DETAILS

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. The Substantial Contribution requirement will be waived for Group Number 2 trainees.

Productive Lab Training

PL training will be provided to Production Staff. All PL training will be in Manufacturing Skills and will supplement Class/Lab coursework. PL training is conducted at the job site.

Classroom instruction is insufficient to learn all necessary manufacturing skills. Therefore, trainees must receive training in a hands-on PL learning environment. Trainees will be crossed trained on new techniques and equipment.

The trainer's time will be dedicated to training delivery during all hours of training. Instructors are subject matter experts. Trainers will train on various equipment: Assembly Techniques, Multi-Platter devices, Preventative Tool Maintenance, Software Integration and Testing, Proper Selection, and use of Test Equipment techniques. The trainer will then supervise the trainee conducting these same tasks, until the trainee is proficient. Trainers will work directly with trainees at a 1:1 trainer-to-trainee ratio.

To ensure trainees reach optimal skills levels trainees will receive approximately 40 hours of PL-Manufacturing Skills training.

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

WDC has retained the services of the following Subcontractor.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	National Training Company, Inc.	Irvine	\$ 15,000.00
Administrative	National Training Company, Inc.	Irvine	13.00% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

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

PROPOSED TRAINING PROJECT DETAILS

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
*ET16-0216	Alameda, Orange, and Santa Clara	11/16/15-1/14/17	\$583,920	\$158,643 (incumbent earnings)	27%
ET14-0194	Alameda, Santa Clara, and Orange	10/28/13-0/27/15	\$607,070	\$607,070 (incumbent earnings)	100%

*ET16-0216 –Training necessarily halted due to the acquisition of new companies during the term of the contract. WDC had expected the integration of the new companies to go smoothly. However, the business model needed to be redesigned. This effort resulted in ETP training being delayed, and subsequent poor performance. However, the integration of the new companies is now completed.

WDC and its affiliates require training to ensure seamless and exceptional sales, customer service and support.

The funding amount of this proposal has been right-sized to reflect prior earnings.

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Business Fundamentals
	Business Operations
	Changeover Procedures
	Computer/Internet Applications in Business
	Conflict Resolution
	Cross-Functional Strategic Management
	Effective Budget Management
	Internal Corporate Systems and Communications
	Leadership Skills
	Marketing Techniques
	Maximizing Interactions
	New Product Development
	Operational Skills
	Operations Planning
	Product Knowledge
	Project Requirements Analysis and Specifications
	Retaining Customers
Strategic Sales Negotiation Techniques	
Computer Skills (Standard)	Cloud Management/Computing
	Computer Security
	Computer-Aided Design
	Computer-Based Diagnostic Equipment
	Cyber Security
	Data Migration
	Designing Software Applications
	Digital Commerce
	E-Mail Best Practices
	IT Infrastructure
	Material Resource Planning
	MATLAB Statistical Analysis
	Microsoft Desktop Optimization Pack
	Mobile Development
	Mobile Technology
	MS Office (Advanced)
	MS Office (Intermediate)
	Network Design/Architecture
	Project Management Software
	Software Development
Software Synchronization	

Attachment 2 - Training Delivery and Curriculum Listing

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

	Software Troubleshooting
	Using Advanced Excel for Statistical Analysis
	Web Usability Testing
	Western Digital Software Applications
Continuous Improvement Skills	5S Principles
	Conflict Management Strategies
	Creating a Quality Organization
	Critical Thinking Skills
	Efficiency Workflow
	Elements of a Cohesive Team
	Embracing Organizational Change
	How to Coach and Mentor
	Integrated Resource Management
	Interpersonal Communications
	Kaizen Events
	Leading Innovation
	Leading the Global Workforce
	Lean Manufacturing
	Motivating and Engaging Your Team
	New Management and Planning
	Personal Productivity
	Process Improvement
	Quality Control Techniques
	Quality Fundamentals/Core Skills
	Quality Measures and Goals
	Six Sigma Processes
	Standard Operating Procedures
	Supply Chain Optimization
	Total Quality Management
Manufacturing Skills (ME) (Standard)	Acceptance Testing
	Arial Density Specifications
	Assembly Techniques
	Cross-Training On Production Equipment/Skills
	Heat-Assisted Magnetic Recording
	Lean Manufacturing Principles and Tools
	Manufacturing Resource Planning
	Multi-Platter Drives
	Operation and Maintenance of New Tools
	Parts and Product Specifications
	Preventative Tool Maintenance
	Production Processes/Techniques/Workflow

Attachment 2 - Training Delivery and Curriculum Listing

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

	Proper Selection and use of Test Equipment
	Quality Control Processes
	Shingled Magnetic Recording
	Solid State Electronic Devices
	Tool Cleaning and Inspection

Delivery Method /Level	Productive Laboratory
Training Type (Level)	Planned Course Offerings
Manufacturing Skills (ME) (Standard)	Assembly Techniques
	Cross-Training On Production Equipment/Skills
	Multi-Platter Drives
	Preventative Tool Maintenance
	Proper Selection and use of Test Equipment
	Software Integration and Testing
PL Justification and Details	
Explain the need for productive laboratory (PL) training	Classroom instruction is not an adequate means of training. Trainees need to learn the skills that require hands on experience. The equipment is too large to bring into classroom. Trainees will be cross trained on any new techniques and equipment. The occupations that will be trained using productive lab are production staff.
Describe the Equipment/Processes to be used in delivering the PL training	Assembly Techniques, Cross-Training on Production Equipment Skills, Multi-Platter Drives, Preventative Tool Maintenance, Software Integration and Testing, Proper Selection and use of Test Equipment.
Describe Trainer Qualifications	Trainer will have at least two years of experience before training others.
Trainer to Trainee Ratios - If more than one PL class the ratios are the lowest and the highest trainer-to-trainee ratio	Trainer
Ratio for One Class, or Minimum When More than One Class	1
Ratio for Maximum Ratio When More than One Class	3
PLT Approval	Yes



RETRAINEE - JOB CREATION

Training Proposal for:

Zodiac Seat Shells U.S. LLC

Agreement Number: ET18-0223

Panel Meeting of: May 24, 2018

ETP Regional Office: North Hollywood

Analyst: M. Webb

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative HUA	Industry Sector(s):	Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Santa Barbara	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: 1,050	U.S.: 11,500	Worldwide: 58,000
<u>Turnover Rate:</u>	5%		
<u>Managers/Supervisors:</u> (% of total trainees)	6%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$99,136		\$0	\$0		\$99,136

In-Kind Contribution:	100% of Total ETP Funding Required	\$100,870
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate HUA	Business Skills, Computer Skills, Continuous Improvement, Hazardous Materials, Manufacturing Skills, PL- Manufacturing Skills	245	8-200	0-57	\$396	*\$12.53
				Weighted Avg: 22			
2	Retrainee Job Creation Initiative Priority Rate HUA	Business Skills, Computer Skills, Continuous Improvement, Hazardous Materials, Manufacturing Skills, PL- Manufacturing Skills	5	8-200	0-57	\$740	*\$11.00
				Weighted Avg: 37			

*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: \$12.53 per hour for Santa Barbara County.
 Job Number 2 (Job Creation/High Unemployment Area): \$11.00 per hour for Santa Barbara County.
Health Benefits: Yes No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: Yes No Maybe
 Up to \$2.50 per hour may be used to meet the Post-Retention Wage for Job Number 2 only.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
JOB NUMBER 1		
Administrative Staff		24
Engineers		40
Information Systems Staff		8
Lead Staff		20
Manager/Supervisor		14

Production Staff		100
Support Staff		35
JOB NUMBER 2 (Job Creation)		
Administrative Staff		1
Engineer		1
Information Systems Staff		1
Manager/Supervisor		1
Production Staff		1

INTRODUCTION

Founded in 2012, Zodiac Seat Shells U.S. LLC (formerly Weber Aircraft LLC) (Zodiac) (www.zodiacaerospace.com) designs and manufactures seat shells that are used in airplanes. Located in the city of Santa Maria, the company manufactures components of products designed and manufactured by its parent division, Zodiac Seats LLC. Customers include airlines such as Qantas, Cathay Pacific, and American Airlines. This will be the Company's third ETP Agreement, and second within five years. This will be the only location participating in training under this training proposal.

PROJECT DETAILS

The business class airline market continues to increase, pushing airlines to create a premium customer experience to their business class cabins. To meet customer expectations, Zodiac is now producing three herringbone products to offer to airlines: Cirrus NG, the original Cirrus, and Aries. The Company recently updated its Cirrus product with a new seat shell, Cirrus NG. This seat product line has added functionality and provides additional space for passengers. The original Cirrus seat shell is considered an outward-facing herringbone, which point away from the planes aisle. The new seat center configuration manufactured by Zodiac will allow two different layouts for passenger seat configurations. Designers can use the classic Cirrus alongside Cirrus NG configuration or place seats in the reversed angle Cirrus seat, which makes the best use of space available for center seats.

As new products are developed and re-designed, Zodiac must reconfigure manufacturing and assembly processes to produce new seat lines. By doing so, the Company anticipates repeat customers who will continue to utilize their products. These changes have created the need to train Production Staff to design, manufacture and inspect these new seat products. Trainees will participate in Manufacturing Skills training to learn new techniques that will reduce cycle time, learn new specifications, and operate fabrication and plastic molding equipment.

To improve product quality and identify waste in the production process, Zodiac has included staff in the development process to improve efficiencies. As training progresses, the Company expects lean manufacturing and other related components will lead to additional ways to reduce costs and increase productivity.

Training Plan

Business Skills: Training will be offered to Administrative Staff, Engineers, Production Staff, Leads, and Managers/Supervisors. Training will improve employee's ability to utilize problem solving skills in a timely manner.

Computer Skills: Training will be offered to all occupations to expand usage of existing computer systems at Zodiac. Trainees will learn to use production/distribution and planning software.

Hazardous Materials: Training will be offered to Production Staff, Leads, and Managers/Supervisors to ensure workers utilize safe handling of flammable and hazardous materials. This training is also a series of courses, specific to industry sectors involved in the transport of hazardous materials.

Manufacturing Skills: Training will be offered to Production Staff, Leads, and Managers/Supervisors. Trainees will receive training on new production specifications, and customized products to improve employees' technical knowledge.

Continuous Improvement: Training will be offered to all occupations to improve employee skills and increase problem solving skills.

Computer Based Training:

Zodiac will provide Computer Based Training (CBT). Training topics that may be provided include Continuous Improvement, Business Skills, and Manufacturing Skills. This type of training is cost effective, and allows trainees to complete training at their own pace. CBT is customized to occupational needs with specialized training topics. Trainees may receive up to 57 hours of training in CBT.

Productive Laboratory (PL):

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

Production Staff will receive PL training to effectively operate machinery in a safe and proficient manner. Areas of equipment training will include production assembly repair, forming, fabrication, plastic molding, and thermoforming. Trainees are required to obtain completion of a competency checklist to independently: power up machine, perform startup procedures, confirm machine meets operating requirements, stage material/products, and operation in production process, troubleshoot production problems, and powering down machine. An instructor will observe as trainee demonstrates ability to execute all steps in the production process (equipment operation). Trainees will receive up to 60 hours of PL training.

The Company is requesting a trainer-to-trainee ratio of 1:3. Although a majority of training will be 1:1, there are special scenarios where it will be 1:3 as instructors are not always available during particular production shifts.

Electronic Recordkeeping

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

High Unemployment Area

Trainees in Job Numbers 1 and 2 work in a High Unemployment Area (HUA), a region with unemployment exceeding the state average by at least 25%. The Company's locations in Santa Barbara County are in a HUA. For these trainees, the Panel may modify the ETP Minimum Wage by up to 25%, from \$16.70 per hour to \$12.53 per hour for Job Number 1, and \$11.00 for Job Number 2. Zodiac is requesting this modification for trainees in Job Numbers 1 and 2.

Commitment to Training

The training budget for the Santa Maria facility is approximately \$100,870 annually. Training includes new-hire orientation, basic computer skills training, safety regulation training, and on-the-job training.

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

➤ Training Infrastructure

Zodiac has a detailed training plan in place and is ready to begin training upon Panel approval. The Company's Project Engineering Manager will oversee training and administration of this Agreement. Staff is familiar with ETP record keeping requirements, enrollment, and payment processes. Zodiac has also hired a third party administrator, National Training Company, Inc. to assist with data entry and other ETP related administrative duties. Training will be delivered by in-house instructors.

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.

Zodiac has committed to hiring 5 new employees (Job Number 2). As business expands, Zodiac must continue to design and manufacture products efficiently. New employees will staff new production lines and contribute towards the development of new Zodiac seat shells for customers. Training provided to newly hired workers will include Manufacturing Skills to operate equipment, Computer Skills to learn Zodiac computer programs/systems, and Business and Continuous Improvement to increase employee skills. Trainees will learn company procedures, production processes, and business operations. 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.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned	
				\$	%
ET16-0446	Santa Maria	04/23/16-04/22/18	\$64,150	\$62,478	(97%)
ET14-0216	Santa Maria	11/25/13-11/24/15	\$180,680	\$59,334	(32%)

ET14-0216: Zodiac experienced high demand for their products during this time. Due to rapid growth and increase in business, trainees could not be released from their jobs to attend training classes. The Company earned a final amount of \$59,334. The business has since stabilized and Zodiac has increased capacity to focus on training.

DEVELOPMENT SERVICES

Zodiac retained National Training Company, Inc. in Irvine to assist with development of this proposal for a flat fee of \$5,000.

ADMINISTRATIVE SERVICES

National Training Company, Inc. will also perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

N/A

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

8-200

Trainees may receive any of the following:

CONTINUOUS IMPROVEMENT

- 5 S Training
- Best Manufacturing Practices
- Business Improvement Principles
- Coaching/Counseling/Motivation Techniques
- Communication Skills
- High Performance Work Teams
- Inspection Procedures
- Leadership in Action Training
- Lean Manufacturing
- Management Essentials
- Performance Management
- Quality Control
- Standard Operating Procedures
- Team Building
- Team Problem Solving
- Waste Reduction
- Zodiac Quality Systems

COMPUTER SKILLS

- 3D PDF Viewer
- Computerized Reports
- Computer/Internet Applications in Business
- Computer-Aided Design
- Cyber Security Tools
- Database Administrator/Developer Tools and Utilities
- Document Control
- Engineering Design Software
- Hardware Request Process Training
- Human Resources Database System
- Manufacturing Resource Planning
- MS Office (Intermediate and Advanced)
- Network Accounts Process Training
- Network Developer Tools and Utilities
- Production/Distribution/Planning Software
- Project Management Applications
- Software Development

MANUFACTURING SKILLS

- Assembly Procedures and Methods
- Cycle Time Reduction Techniques
- Fabrication Equipment
- Foreign object Detection
- Forming Equipment

- Inspection Skills
- Inventory Control Operations
- Large Assembly Management Engineering Materials
- Manufacturing Audit Process
- Manufacturing Techniques
- Material Handling
- Plastic Molding Equipment
- Plastic Thermoforming
- Plastic Injection Molding
- Product Development, Design and Qualification
- Production Equipment/Tools
- Production Processes
- Production Scheduling
- Repair Station Procedures
- Resolving Production Problems
- Seat Shell Fabrication
- Standard Operating Procedures
- Technical Specifications

BUSINESS SKILLS

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

HAZARDOUS MATERIALS SKILLS

- Flammability Control Procedures
- Hazardous Materials Handling
- Hazardous Safety Procedures

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 (1:3)

0-60

MANUFACTURING SKILLS

- Component Fabrication Equipment
- Component Forming Equipment
- Plastic Thermoforming Equipment
- Plastic Injection Molding Equipment
- Production Assembly and Repair Equipment

CBT Hours

0-57

CONTINUOUS IMPROVEMENT

- Closing an Inquiry (1 Hour)
- Configuration Management Principles (1 Hour)
- Design Failure Mode and Effect Analysis (1 Hour)
- Document Change Requests (1 Hour)
- Intelx Training - Recording an Audit (1 Hour)
- Introduction to Auditing (3 Hours)
- Lead Man Training (2 Hours)
- Leadership Advantage : Coaching 2.0 (2 Hours)
- Process Audit Training (3 Hours)

COMPUTER SKILLS

- Adding new Asset via GL Entry (30 Minutes)
- Adding Tracking Information-Sales (30 Minutes)
- Lesson 1 Texts Dates Times (1 Hour)
- Lesson 10-SmarTeam SQL Queries (1 Hour)
- Lesson 12 - VBA Basics (1 Hour)
- Lesson 13- VBA Basics 2 (1 Hour)
- Lesson 14 - VBA Basics 3 (1 Hour)
- Lesson 15-VBA Basics 4 (1 Hour)
- Lesson 4-Data Tables (1 Hour)
- Lesson 5-Dynamic Charts (1 Hour)
- Lesson 7-Data Connections (1 Hour)
- Lesson 8-Queries (1 Hour)

MANUFACTURING SKILLS

- Advanced Surface Meshing (3 Hours)
- Aircraft Coordinates (1 Hour)
- Airworthiness Awareness (1 Hour)
- Application of Silicone Sealant (1 Hour)
- Applying Alodine (1 Hour)
- AutoVue Graphic Screen (1 Hour)
- AutoVue Measure (1 Hour)
- Baseframe Requalification (2 Hours)
- Charges Header Level (1 Hour)
- Controlled Contamination Area Training (1 Hour)
- Corrective Action (1 Hour)
- Hole Making and Sizing (1 Hour)
- How to Torque (1 Hour)
- Hydraulic Principles (2 Hours)

- Injection Molding Design (1 Hour)
- Inserts and Edgefill Familiarization (1 Hour)
- Lot Traceability (1 Hour)
- Machine Part Design (1 Hour)
- Manufacturing Processes Overview (1 Hour)
- Non-Conformance Reports (1 Hour)
- Nut & Bolt Markings & Thread Pitch (1 Hour)
- The Cylinder Re-Testers Guide (1 Hour)
- Tool Prep and Demold (1 Hour)

BUSINESS SKILLS

- Checking MO Costing and Variance (1 Hour)
- Checking Product Costing (1 Hour)
- Flag a PO Line as Complete EX 2 (1 Hour)

HAZARDOUS MATERIALS SKILLS

- Checking Flammability Control Procedures (1 Hour)

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



RETRAINEE - JOB CREATION

Training Proposal for:

Pandora Media, Inc.

Agreement Number: ET18-0220

Panel Meeting of: May 24, 2018

ETP Regional Office: North Hollywood

Analyst: M. Paccereilli

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative	Industry Sector(s):	Technology/IT Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles, 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: 1,800	U.S.: 2,000	Worldwide: 2,488
<u>Turnover Rate:</u>	5%		
<u>Managers/Supervisors:</u> (% of total trainees)	20%		

FUNDING DETAIL

<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">Program Costs</td></tr> <tr><td style="text-align: center;">\$750,000</td></tr> </table>	Program Costs	\$750,000	-	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">(Substantial Contribution)</td></tr> <tr><td style="text-align: center;">\$0</td></tr> </table>	(Substantial Contribution)	\$0	=	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">(High Earner Reduction)</td></tr> <tr><td style="text-align: center;">\$0</td></tr> </table>	(High Earner Reduction)	\$0	=	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">Total ETP Funding</td></tr> <tr><td style="text-align: center;">\$750,000</td></tr> </table>	Total ETP Funding	\$750,000
Program Costs														
\$750,000														
(Substantial Contribution)														
\$0														
(High Earner Reduction)														
\$0														
Total ETP Funding														
\$750,000														

In-Kind Contribution:	100% of Total ETP Funding Required	\$1,725,855
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Advanced Tech, Computer Skills, Business Skills	800	8-200	0-100	\$900	\$17.54
				Weighted Avg: 50			
2	Retrainee Priority Rate Job Creation Initiative	Advanced Tech., Computer Skills, Business Skills	25	8-200	0-100	\$1,200	\$16.00
				Weighted Avg: 60			

Minimum Wage by County:

Job Number 1: \$17.54 per hour in Los Angeles County, \$18.22 per hour in Alameda County
 Job Number 2: \$14.62 per hour for Los Angeles County, \$15.18 per hour in 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

Job Number 1: Up to \$1.54 per hour may be used to meet the Post-Retention Wage in Los Angeles County and up to \$2.22 per hour in Alameda County

Job Number 2: Although employer provides health benefits, they are not being used to meet the Post Retention Wage

Job Numbers 1 & 2 Wage Range by Occupation

Occupation Titles	Wage Range	Estimated # of Trainees
Advertising Operations/Account Manager		180
Business Support Staff		70
Design & Audio Designer/Producer		30
Engineer/Scientist		50
Marketing/Business Development Staff		100
Music Operations Staff		30
Product Management Staff		60
Sales Staff		60
Strategic Solutions Staff		30
Technical Operations/Information Technology (IT) Staff		50
Manager/Supervisor		165

INTRODUCTION

Pandora Media, Inc. (Pandora) (www.pandora.com) is a music streaming and automated music recommendation service. Pandora is an Internet radio which plays musical selections of a certain genre based on the user's artist selection on a wide range of smartphones, tablets, computers and car audio systems, as well as a range of other internet-connected devices.

Founded in 2000, Pandora started as a small company called Savage Beast Technologies with the idea of creating music preference profiles for users into an online music recommendation system using its proprietary Music Genome technology. Eventually, the Company used the genome as the engine of an Internet radio service that plays only the music users like.

As a powerful music discovery platform, Pandora offers a personalized experience for each of its listeners wherever and whenever they want to listen to music – whether through earbuds, car speakers or live on stage. Its vision is to be the definitive source of music discovery and enjoyment for billions.

Unlike traditional radio stations that broadcast the same content at the same time to its listeners, Pandora enables each of its listeners to create personalized stations. The Music Genome Project and its content programming algorithms power its ability to predict listener music preferences, play music content suited to the tastes of each individual listener and introduce listeners to music Pandora thinks they will love. Training will be provided at Pandora's locations in Santa Monica and Oakland.

Retrainee - Job Creation

The internet industry is competitive and rapidly changing. Pandora is expanding its business capacity, adding new employees to existing functions in sales, administrative, financial, and technology teams. Pandora is committed to hiring and training 25 new employees (Job Number 2) to develop new ideas, provide better service to users, and support internal staff.

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

PROJECT DETAILS

This will be Pandora's second ETP Agreement. Pandora had a conservative training plan in its first contract. The training was designed to enhance Pandora's competitiveness and ensure employees perform optimally.

In this proposal, Pandora will be able to expand the scope of training to a larger trainee population. Given the successful performance of the last contract and expanded scope of the proposed training, the amount of this proposal exceeds the prior contract.

The training will also support its new product offerings that were launched since the last contract such as *Pandora Plus* and *Pandora Premium*. With the rapid advancement of technology and new innovations being discovered, Pandora keeps current with industry demands and is constantly refining its technology and expanding the platform it supports. Pandora must have an efficient workforce skilled across many platforms and different types of technologies so it can develop the best solutions and experiences for its users.

Training Plan

Business Skills - Training will be offered to all occupations to help improve their product development skills and equip them with effective communication, decision-making, and goal-setting skills. Training will focus on customer solutions, quality processes, sales and marketing, and competitive product, market, and technology knowledge.

Computer Skills - Training will be offered to all occupations to provide the skills beyond the basics of each application and take advantage of each application's features to improve productivity and efficiency.

Advanced Technology (AT) - Training will be offered to Technical/IT Staff, Designers, Scientists, and Engineers. These trainees need advanced skills to get ahead of the technology curve. As a digital technology company in an intensely competitive marketplace, Pandora must have a technical workforce skilled to manage its platform and develop the best solutions and experiences for its users.

AT will be delivered in highly technical learning environments, including special curricula, instructors and training labs. The costs for delivering AT training range from \$50 to \$80 per trainee hour, plus hardware, software, and setup costs. Some classes will be configured on a special network environment to simulate real-world scenarios. The trainer-to-trainee ratio is 1:10 to allow for in-depth coverage and personal attention from the instructor.

Learning Management System

Pandora uses a Learning Management System to manage all training hours for employees. The system meets all ETP requirements and has been approved by staff to be used for ETP recordkeeping.

Commitment to Training

ETP funds will not displace the existing financial commitment to training. In support of continuous employee development, Pandora's current training budget is approximately \$1M and covers general skills training, new-hire orientation, legally mandated training, 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 Infrastructure

Pandora has a detailed training schedule in place and is ready to roll out training upon Panel Approval. Pandora's Learning & Development Team will oversee the training and internal project administration. Training will be provided by in-house trainers who are subject matter experts. The Company has a well-established training platform and internal administrative procedures using its own Learning Management System that provides standardization, enrollment, training, and tracking services. In addition, Pandora has retained an outside administrative consultant to ensure that all training records meet ETP compliance.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0144	Los Angeles, Oakland	12/30/15 – 12/29/17	\$249,600	\$249,600 (100%)

DEVELOPMENT SERVICES

Pandora retained The Enterprise U in Santa Monica to assist with development of this proposal for a flat fee of \$5,000.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

N/A

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- ✦ Analytics Training
- ✦ Appreciating Our Differences
- ✦ Audience Analysis & Listener Experience
- ✦ Broadcast Basics
- ✦ Business Analysis & Business Intelligence
- ✦ Competitive Product, Market, & Technology Knowledge
- ✦ Creating a Culture of Innovation & Execution
- ✦ Creative Thinking and Problem Solving
- ✦ Customer Service
- ✦ Customer Solutions
- ✦ Effective Communication (Written and Verbal)
- ✦ Effective Decision-Making
- ✦ Effective Goal-Setting
- ✦ Emotional Intelligence
- ✦ Ensuring Quality Processes
- ✦ Financial Fundamentals
- ✦ Interpersonal Skills
- ✦ Knowledge Management
- ✦ Leading Effective Meetings
- ✦ Leadership Skills
- ✦ Managing Time and Priorities
- ✦ Mobile Processes and Guidelines
- ✦ Navigating Through Change
- ✦ Negotiating Skills
- ✦ Organizational Development Imperatives
- ✦ Partner Quality and Compliance
- ✦ Powerful Presentation Skills
- ✦ Project Management
- ✦ Risk Mitigation and Risk Review
- ✦ Sales & Marketing Tools and Techniques
- ✦ Strategic & Innovative Thinking
- ✦ Teambuilding

COMPUTER SKILLS

- ✦ Intermediate & Advanced Microsoft Office Suite & Data Tools
(Word, Excel, Outlook, PowerPoint, Access, Project)
- ✦ Graphics Applications and Web Programming Tools

ADVANCED TECHNOLOGY

(For Technical Operations/IT, Designers, Scientists and Engineers only)

- ✦ Agile Developer Essentials
- ✦ Android Programming
- ✦ Apache Hadoop
- ✦ Be Agile
- ✦ C Programming
- ✦ Cascading Style Sheets

- 🚀 Certified Scrum Master
- 🚀 Certified Scrum Product Owner
- 🚀 Cisco
- 🚀 Continuous Integration Build Pipeline
- 🚀 Django
- 🚀 Engineering U
- 🚀 Geek Week
- 🚀 GitHub
- 🚀 HTML
- 🚀 iOS
- 🚀 ITIL
- 🚀 Java Performance Tuning
- 🚀 JavaScript
- 🚀 Kanban for Development and IT/OPS
- 🚀 Mojito
- 🚀 Multiplatform Programming
- 🚀 Network Security
- 🚀 Ninjaneering workshop: Clean Code Practices
- 🚀 Node.js
- 🚀 Oracle / Essbase
- 🚀 Perl Essentials
- 🚀 PHP Essentials
- 🚀 Pig Development
- 🚀 Python
- 🚀 RHEL Performance Tuning
- 🚀 Ruby
- 🚀 Service Oriented Architecture
- 🚀 Software Lifecycle Methodologies (UML, Agile, Scrum)
- 🚀 SQL
- 🚀 Testing and Refactoring (C++, Java, Javascript)

CBT Hours

0 – 100

COMPUTER BASED TRAINING (CBT)**BUSINESS SKILLS**

- 🚀 Activity Guide (1)
- 🚀 AdTech (1)
- 🚀 Ad Products (1)
- 🚀 Advertiser and Agency Growth (1)
- 🚀 All Things Creative (1)
- 🚀 Amplified Solutions (1)
- 🚀 Analytics (1)
- 🚀 Answer Key (1)
- 🚀 ARIA (1)
- 🚀 Audience Explorer (1)
- 🚀 Audience Monetization (1)
- 🚀 Audience Verification (1)
- 🚀 Audio 101 (1)
- 🚀 Billing (1)
- 🚀 Booking Analysis (1)
- 🚀 Boot Camp (1)
- 🚀 Brainstorming (1)
- 🚀 Broadcast (1)
- 🚀 Browsing (1)

- # Building Playlists (1)
- # Buyer Story (1)
- # Campaign Insights (1)
- # Check-in Conversations (1)
- # Client Communications (1)
- # Client Data (1)
- # Cloud Computing (1)
- # Cloud Services (1)
- # Communication Styles (1)
- # Competitive Product, Market, & Technology Knowledge (1)
- # comScore (1)
- # Contextual Targeting (1)
- # Core Narrative (1)
- # Creative Creation (1)
- # Creative Problem Solving (1)
- # Custom Station (1)
- # Delivering Your Upsell (1)
- # Design 101 (1)
- # Design Thinking (1)
- # Developing Your Presentation Style (1)
- # Digital 101 (1)
- # Digital 201 (1)
- # Digital Media Sales (1)
- # Dynamic Display (1)
- # Email, Phishing, and Messaging (1)
- # Employee Story (1)
- # Engineering U (8)
- # Episodes (1)
- # Exporting and Viewing Reports (1)
- # Facilitation (1)
- # Finance Knowledge (1)
- # Foundations (1)
- # Freshman Year (8)
- # Gear Up Week (8)
- # Go Sell (1)
- # Growth and Development (1)
- # Hacked (1)
- # How We Set Goals (1)
- # Information Security (1)
- # Insertion Orders (1)
- # Inside Sales (1)
- # Integrity (1)
- # Junior Year (1)
- # KPIs (1)
- # Leading (8)
- # Marketing Funnel (1)
- # Media Plans (1)
- # Mobile Device Security (1)
- # Multicultural Opportunities (1)
- # Network for Development (1)
- # Nielsen (1)
- # Opportunity Creation (1)
- # Organizational Influence (1)

- ✚ Own the Room (1)
- ✚ Own Your Network (1)
- ✚ Pandora Games (1)
- ✚ Pandora Privacy and Data Security (1)
- ✚ Pandora U (8)
- ✚ Performance Improvement (1)
- ✚ Performance Management (1)
- ✚ Performance of a Lifetime (1)
- ✚ Persuasion and the Power of Story (1)
- ✚ Physical Security (1)
- ✚ Pipeline Analysis (1)
- ✚ Playback & Discovery (1)
- ✚ Presentation Skills (1)
- ✚ Process Overview (1)
- ✚ Product Summit (1)
- ✚ Products 101 (1)
- ✚ Products 102 (1)
- ✚ Professional Communication (1)
- ✚ Programmatic Messaging (1)
- ✚ Project Management (1)
- ✚ Protecting Confidential and Sensitive Data (1)
- ✚ Public Speaking (1)
- ✚ Radio 101 (1)
- ✚ Reach & Frequency (1)
- ✚ Retargeting (1)
- ✚ Revenue Operations (1)
- ✚ Sales, Marketing & PR (1)
- ✚ Sales Partners (1)
- ✚ Sales Power Hour (1)
- ✚ Sales Research (1)
- ✚ Sales Training (8)
- ✚ School of Classical (1)
- ✚ School of Country (1)
- ✚ School of Disco (1)
- ✚ School of Hip Hop (1)
- ✚ School of Jazz (1)
- ✚ School of Motown (1)
- ✚ School of Pop (1)
- ✚ School of Punk (1)
- ✚ School of Rock (1)
- ✚ Searching Content (1)
- ✚ Social Engineering (1)
- ✚ Sophomore Year (8)
- ✚ Sponsored Listening (1)
- ✚ Storytelling (1)
- ✚ Strategy Sheet (1)
- ✚ System Guide & FAQ (1)
- ✚ Targeting (1)
- ✚ User Story (1)
- ✚ Video Ads (1)
- ✚ Viewability (1)
- ✚ What Motivates Us (1)
- ✚ Working Remotely (1)

✚ Workflows (1)

COMPUTER SKILLS

✚ Captivate (1)

✚ PowerPoint (1)

✚ Keyboard Shortcuts for PowerPoint (1)

✚ Salesforce Basics (1)

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



RETRAINEE - JOB CREATION

Training Proposal for:

Renew Health Consulting Services, LLC

Agreement Number: ET18-0221

Panel Meeting of: May 24, 2018

ETP Regional Office: North Hollywood

Analyst: M. Paccereili

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate SET Medical Skills Training HUA	Industry Sector(s):	Healthcare Services Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles, San Bernardino, Alameda, Contra Costa, Orange, Riverside, Ventura	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No SEIU Local 2015		
Number of Employees in:	CA: 2,479	U.S.: 3,373	Worldwide: 3,373
<u>Turnover Rate:</u>	6%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

FUNDING DETAIL

<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">Program Costs</td></tr> <tr><td style="text-align: center;">\$560,852</td></tr> </table>	Program Costs	\$560,852	-	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">(Substantial Contribution)</td></tr> <tr><td style="text-align: center;">\$0</td></tr> </table>	(Substantial Contribution)	\$0	-	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">(High Earner Reduction)</td></tr> <tr><td style="text-align: center;">\$0</td></tr> </table>	(High Earner Reduction)	\$0	=	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">Total ETP Funding</td></tr> <tr><td style="text-align: center;">\$560,852</td></tr> </table>	Total ETP Funding	\$560,852
Program Costs														
\$560,852														
(Substantial Contribution)														
\$0														
(High Earner Reduction)														
\$0														
Total ETP Funding														
\$560,852														

In-Kind Contribution:	100% of Total ETP Funding Required	\$955,280
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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	Medical Skills Priority Rate SET	MS-Didactic, MS-Preceptor, Computer Skills, Cont. Imp.	676	8-200	0	\$684	\$22.77
				Weighted Avg: 38			
2	Job Creation Medical Skills Priority Rate SET	MS-Didactic, MS-Preceptor, Computer Skills, Cont. Imp.	32	8-200	0	\$880	*\$13.66
				Weighted Avg: 44			
3	Medical Skills Priority Rate SET HUA	MS-Didactic, MS-Preceptor, Computer Skills, Cont. Imp.	93	8-200	0	\$756	*\$12.53
				Weighted Avg: 42			

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

Minimum Wage by County: Job Number 1 (SET/Priority Industry): \$22.77 per hour
 Job Number 2 (SET/Job Creation): \$14.62 per hour for Los Angeles County; \$14.58 per hour for Orange County; \$15.18 per hour for Alameda and Contra Costa counties; \$13.66 per hour for Ventura, Riverside and San Bernardino counties
 Job Number 3 (SET/HUA): \$13.25 per hour for Los Angeles County; and \$12.53 per hour for and 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 \$2.50 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		
Registered Nurse		168
Licensed Vocational Nurse		483
Therapist		25
Job Number 2 (Job Creation)		
Certified Nurse Assistant		32
Job Number 3 (HUA – San Bernardino, Pomona, and Compton locations only)		
Certified Nurse Assistant		93

INTRODUCTION

Founded in 2015 and headquartered in Monrovia, Renew Health Consulting Services, LLC (Renew) specializes in providing senior care. The Company provides certified skilled nursing care and rehabilitation services. Services includes short-term and long term skilled nursing care, hospice care, medication management, hospice, behavioral health support, traumatic brain injury, wound treatment, dementia care, and special dietary and meal services.

There will be 15 Renew facilities in California participating in this proposal as follows:

- Renew Health Consulting Group in Monrovia
- Arrowhead Healthcare Center in San Bernardino
- Griffith Park Rehabilitation Center in Glendale
- Hyde Park Rehabilitation Center in Los Angeles
- Lake Merritt Healthcare Center in Oakland
- Orinda Care Center in Orinda
- Park West Rehabilitation Center in Reseda
- Pomona Valley Rehabilitation Center in Pomona
- Redwood Healthcare Center in Oakland
- Rehabilitation Center of Orange County in Buena Park
- Riverside Heights Healthcare Center in Riverside
- Santa Fe Heights Healthcare Center in Compton
- Simi Valley Healthcare Center in Simi Valley
- Valley Vista Nursing and Transitional Care in North Hollywood
- Valley Vista Residential Manor in North Hollywood

Union

Occupations for four facilities are under a collective bargaining agreement with SEIU Local 2015 and a letter of union support was provided to ETP.

PROJECT DETAILS

This will be Renew's first ETP project. Renew needs to train its workers in response to ongoing regulatory change impacting the healthcare industry. SB 97 takes effect on July 1, 2018, requiring select skilled nursing facilities to have a minimum number of direct care service hours, per patient per day. The baseline cost of hiring and training new CNA, ranges from \$6,125 to \$7,800 making Renew's compliance for SB 97 expensive - \$196k to \$250k excluding wages and benefits. CNAs will receive up to 75 hours during the 21-month training period.

Renew must also upgrade the skills and competencies of its incumbent employees. Training will allow the Company to strengthen and lengthen curriculums, continue to rollout initiatives, and train current staff to increase their skills to effectively care for its patient population. Training initiatives will include Quality Assurance and Performance Improvement (QAPI), Antibiotic Stewardship, Infection Control and Behavioral Health Services.

Retrainee - Job Creation

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

With the passage of SB97, Renew must expand its workforce and begin hiring and training 32 net new CNAs by the end of June to meet the new compliance standards. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into “net new jobs” as a condition of contract.

Training Plan

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

Computer Skills: Training will be offered to all occupations in Electronic Medical Records software updates to accurately enter and retrieve patient information.

Continuous Improvement: Training will be offered to all occupations to improve skills such as team building, communication skills, person centered care, documentation, customer service, standard operating procedures, QAPI process and quality improvement.

Medical Skills: Training will be offered to the Nursing staff in advanced clinical process such as patient safety, patient assessment and care, respiratory care, wound management, dementia care, rehabilitation aide skills and managing patients with neurovascular condition. This is to ensure competency, patient satisfaction and safety.

For Medical Skills training, the Panel has established a higher reimbursement rate of \$22 per hour for nurse training, recognizing the higher cost of delivery for the Clinical Preceptor model. The standard class/lab rate of \$18 per hour for priority industries will apply to Computer Skills and Continuous Improvement training.

Alternate Retention

Healthcare workers are non-customary workers eligible for full time employment and retention modifications. Renew is requesting to modify the definition of full-time employment from an average of 35 to 30 hours per week in a 90-day period. Additionally, Renew is requesting an alternate retention of 500 hours within 272 days with one employer to satisfy the retention requirement.

Commitment to Training

The Company's current training budget is up to \$75,000 per facility. Training programs include staff orientation, staff in-services, sexual harassment prevention, new hire, safety, vocational and commercial skills. ETP funds will not displace the existing financial commitment to training.

➤ Training Infrastructure

The Vice President of Operations will oversee the administration of this project with the help of the Training Director who will coordinate training centrally at the corporate headquarters in Monrovia. A consultant has been retained to assist with administration and ensure that all training records meet ETP compliance. The Directors of Staff Development at each facility will oversee the internal project administration and training at their corresponding facility. Training will be delivered by in-house subject-matter experts and vendors as needed.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

National Training System Inc. (NTS) in Ladera Ranch assisted with development for a flat fee of \$28,039.

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 - DIDACTIC

- ABT Stewardship
- Annual Skills Update
- Infection Control
- Basic Life Support
- Bedrail QR Coding
- Bedrail Use and safety
- Baseline Care Plan
- Body Mechanics
- Blood Glucose Testing
- Behavioral Health Skills
- Critical Pathway
- Building Respect for Older LGBT Adults
- Dementia Care/ Abuse Prevention
- Dialysis Care
- Enlargement
- Nutrition
- Dehydration
- Weight loss/Gain
- Pneumonia/Flu Immunization
- Patient Transfer Techniques
- Equipment Skills (including, but not limited to pumps, vital monitoring devices, support systems, therapeutic modalities)
- Advanced Cardiac Life Support
- Change of Condition Management/SBAR
- Interdisciplinary Team Process
- Pain Management (Acute and Chronic)
- Intravenous Therapy
- Enteral Feeding Tube Management
- Respiratory Care
- Restorative Nursing
- Wound Management
- Diabetic Management
- Urinary Management (Foley catheter, input/output)
- Resident and Family Education
- Medication Administration Management
- Medication Monitoring
- Restraint and Restraint Reduction
- Behavior Management
- Psychotropic Medication Management
- Patient Assessment & Care
- Physical, Occupational, Speech Therapy
- End of Life Care
- Patient Fall Prevention

- Dementia/Alzheimer's
- Neurovascular System
- Safe Injection Training
- Residents with Special Needs
- Gastrointestinal System
- Laboratory
 - Electrolyte Imbalance
 - Arterial Blood Gas Interpretation
- Cardiac Conditions
- Neurological Conditions
- Resident Emergency Response
- Trachs/Vents
- Skeletal/Orthopedic Conditions
- Incontinence Management (colostomy care, urinary catheter care)

MEDICAL SKILLS - PRECEPTOR (1:1)

- Inpatient & Outpatient Care Unit
 - Medication Management/Black Box Warnings
 - Advanced Assessment Skills
 - Advanced Clinical Skills
 - Infection Control
 - Patient Safety
 - Bedrail QR Coding
 - Bedrail Use and Safety
 - Clinical Skills Review
 - Clinical Certification Skills
 - Dialysis Care
 - Patient Assessment and Care
 - Intravenous Therapy
 - Enteral Management
 - Bolus
 - Intermittent
 - Continuous
 - Feeding Tube
 - Insertion
 - Site Care
 - Removal
 - Dementia Care/Abuse Prevention
 - Assessing of Tube-Fed Individuals with Diabetes Mellitus
 - Preventing and Identifying Complications Related to Tube Feedings
 - Respiratory Care
 - Wound Management
 - Safe Injection Training
 - Immunization
 - Hemovac/Pneumovac
 - Dementia/Alzheimer's
 - Dehydration
 - Managing Patients with Neurovascular Conditions
 - Residents with Special Needs
 - Gastrointestinal Conditions
 - Cardiac Conditions
 - Skeletal/Orthopedic Conditions

- Incontinence Management (colostomy care)
- Assisting and Performing Self-Care Skills with Patients; Facilitating Functional Gains of Each Patient
- Functional Mobility and Ambulation
- Bowel and Bladder Training of Patients
- Identification of Skin Impairments and Prevention
- Identification of Patient Change in Condition
- Monitoring of Cardiovascular Changes such as Vital Signs, Endurance, Level of Consciousness
- Breathing Patterns and Respiratory Function
- Nutrition
- Pain Management
- Positioning of Patients for Correct Body Alignment
- Monitor Blood Pressure of Patients
- Operate Safety Devices with Patient
- Activities of Daily Living
- Conduct Range of Motion Exercises with Patient
- Patient Care of Foot and Hand
- Infection Control
- Charting
- Colostomy Care
- Hazardous Waste Handling
- Isolation Techniques
- Safe Patient Handling
- Weight loss/Gain
- Use of the Call Light System
- Safe Linen Handling

COMPUTER SKILLS

- Electronic Medical Records Application Skills
- Electronic Tablet for Bedside Charting
- Omnicell
- Microsoft Office
- Software Skills

CONTINUOUS IMPROVEMENT

- Administration
- Medical Records
- Customer Service
- Communication Skills
- Compliance
- Conflict Resolution
- Cultural Sensitivity Training
- Problem Analysis and Problem Solving
- Clinical Services System Management
- Interdepartmental Collaboration
- Interdisciplinary Team
- Incident/Accident Management
- Leadership Skills
- Person Centered Care
- Mobility Skills

- Documentation
- Continuous Quality Improvement Workshop
- Culturally Appropriate Care
- Survey Process
- Team Building
- The Five Star Rating System
- QAPI Process
- Facility Assessment

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

seiu 2015

California's Long Term Caregivers

March 29, 2018

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

To Whom It May Concern:

This letter is to confirm the support of SEIU Local 2015 for the ReNew Health Group training proposal as submitted to the Employment Training Panel.

For the Union,



Edward Burke
Statewide Nursing Home Bargaining Director
SEIU Local 2015
681 W. Capitol Ave., Suite 100
West Sacramento, CA 95605
Office: (213) 985-0462
Cell: (213) 595-6661
Email: edwardb@seiu2015.org



RETRAINEE - JOB CREATION

Training Proposal for:

Elevate Home Health, LLC

Agreement Number: ET18-0212

Panel Meeting of: May 24, 2018

ETP Regional Office: San Diego

Analyst: M. Ibarra

PROJECT PROFILE

Contract Attributes:	SET Priority Rate Retrainee Job Creation Initiative Medical Skills Training HUA	Industry Sector(s):	Healthcare Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles, San Joaquin, Fresno, Santa Clara, Monterey, San Diego, Stanislaus	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: 3,877	U.S.: 6,343	Worldwide: 6,343
<u>Turnover Rate:</u>	12%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$361,550		\$0	\$0		\$361,550

In-Kind Contribution:	100% of Total ETP Funding Required	\$816,390
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET Priority Rate Medical Skills	Computer Skills, Cont. Imp., MS-Didactic, MS-Preceptor	175	8 - 200	0	\$1,494	*\$12.53
				Weighted Avg: 83			
2	Retrainee SET Priority Rate Medical Skills Job Creation	Computer Skills, Cont. Imp., MS-Didactic, MS-Preceptor	35	8 - 200	0	\$2,860	*\$11.00
				Weighted Avg: 143			

*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): SET Priority Industry Wage \$22.77 per hour for Los Angeles, Santa Clara, and San Diego County locations; (HUA Wage) \$12.53 per hour for San Joaquin, Fresno Counties, Monterey and Stanislaus counties
 Job Number 2 (Job Creation): \$14.62 per hour in Los Angeles County; \$15.18 per hour in Santa Clara County; \$14.19 per hour in San Diego County; (HUA Wage) \$11.00 per hour in San Joaquin, Fresno, Monterey, and Stanislaus counties
Health Benefits: Yes No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: Yes No Maybe
 Up to \$2.50 per hour of health benefits may be used to meet the Post-Retention Wage for trainees in Los Angeles, Santa Clara and San Diego counties in Job Number 1 only.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Numbers 1 & 2		
Licensed Vocational Nurse		32
Registered Nurse		54
Therapist/Assistant		92
Administrative Support Staff		31
Medical Social Worker		1

INTRODUCTION

Founded in 2009, Elevate Home Health, LLC (EHH) (www.elevatehomehealth.com) offers comprehensive, patient-centered post-acute care program designed to ease and support patient transition following in-patient stay.

EHH's program begins during rehabilitation or hospital stay and extends through the patient discharge to home. Utilizing a licensed nurse, the focus is on patient education, primary care collaboration, medication reconciliation, assistance with equipment and home modification needs, and provision of care as ordered by physicians. The Company's home health services include skilled nursing; physical, speech, and occupational therapy; medical social work; and in-home aide.

EHH is a subsidiary of Covenant Care California, LLC (Covenant). Covenant currently has an active ETP project and will not participate in this proposal. EHH will act as a lead contractor and include closely affiliated entity, Rehabfocus Home Health, Inc. (RHH). This project will target training for workers at one EHH facility located in Los Angeles County and six RHH facilities located in San Joaquin, Fresno, Santa Clara, Monterey, San Diego and Stanislaus counties. EHH's headquarters in Aliso Viejo will coordinate the proposed contract; however, is not included in the proposed training plan.

PROJECT DETAILS

EHH is in the midst of multiple industry changes that began with the Affordable Care Act (ACA) and The Centers for Medicare and Medicaid Services (CMS) Quality Strategies. Acute care hospitals have been transformed by the ACA and CMS regulations to deliver better care at lower cost. Those changes are continuing in the home health industry. As a result, patients are encouraged to seek needed health care in environments less expensive than traditional acute care hospitals. This trend is projected to continue as acute care hospitals are encouraged to release patients earlier from the hospital to reduce the cost of care.

The regulatory changes in the healthcare industry have significantly affected the home health industry. EHH's strategic partnerships and contracts with managed care consortiums such as Kaiser Permanente have resulted in an increase in patient volume. Its services make it possible for people to remain at home rather than use more expensive residential, long term or institutional-based nursing care. As a result, home health care has become an integral component of the post-hospitalization recovery process, specifically, during the initial weeks after discharge when the patient requires some level of regular physical assistance.

Company growth is also generated by an increase in demand for patient care services from aging baby boomers and 80-plus age group population. Over the next 20 years, EHH's role in home-based services delivery will continue to expand and evolve to successfully serve the geriatric population. As such, the Company must be able to cater to the rehabilitation needs of these patients as they recover from surgeries.

To successfully support the increased patient volume, anticipate future patient needs, and provide the associated demand for home health care services, EHH has developed a strategic plan to improve its patient care services and increase staffing requirements. To do this, EHH will implement the following: (1) Case Management Model to promote clinical leadership in all disciplines; (2) specialized patient care services targeted for Assisted Living Facilities allowing more of its residents to "age in place" rather than transition to a different environment and

healthcare provider; and (3) the Outcome and Assessment Information Set document utilized by CMS to improve assessment and data collection.

To further support its commitment, the EHH also plan to hire, train, and retain adequate supply of healthcare workers to meet increased patient demands. The relatively small pool of available skilled healthcare professional in the home healthcare industry calls for increased levels of training for the facilities' entire workforce. Specifically, EHH is dedicated to provide extensive training that will allow its newly-hired workers to successfully deliver exceptional patient care to much sicker patients, reduce hospital readmissions, and increase patient satisfaction.

With the assistance of ETP funding, EHH will be able to provide a comprehensive training program that will include various computer, continuous improvement, and medical skills training. Training will ensure staff demonstrate confidence and experience in role performance in a supportive environment; proficiency in use of key processes to care for patients with complex health care needs; collaboration and communication with other health care professionals in managing quality, cost-effective care for clients; leadership abilities; and effective management of rapidly changing situations. Overall, training will allow EHH to successfully support its growth while providing superior patient care service with a goal to improve quality processes, clinical outcomes, and strategic measures at a reduced cost.

Training Plan

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

Computer Skills: Training will be offered to all occupations in various medical software application skills in Clinical Services System Management, Electronic Medical Records, Kinnser, Consolo, ICD-10 Coding and Microsoft Office Suite.

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

Medical Skills Training

This program provides nurses and allied healthcare occupations with clinical didactic and clinical with preceptor training model.

Staff will receive one or more modules of MS Didactic training (classroom) in advanced medical care to ensure competency. Didactic training will be provided in conjunction with Clinical with Preceptor training to enhance the learning environment. Together, these training environments will enhance learning opportunity and allow trainees to better understand clinical processes and prepare them for work in a home health care environment.

All trainees will participate in MS Clinical Preceptor training. Newly-hired trainees will receive between 104 and 140 hours. Preceptor training is designed to ensure competency in knowledge, attitude, and skills necessary to function in a specific role within the organization.

Retrainee - Job Creation

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

The increasing number of insured and aging population, as well as patients' preference in receiving services at home rather than in a hospital setting, will increase the Companies' patient population. To support EHH growth, the Company will add newly-hired employees to its existing business functions: 35 LVNs, 10 RNs, and 14 Therapists (Job Number 2). The date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

SET/HUA

Ninety-five trainees in Job Number 1 and ten trainees in Job Number 2 work in a High Unemployment Areas (HUA), a region with unemployment exceeding the state average by at least 25%. RHH's locations in Stockton and Fresno Cities qualify for HUA status under these standards; however, the Company is not asking for a wage modification in this proposal.

Commitment to Training

EHH's annual training budget per facility is approximately \$75,000. Training includes onboarding, annual compliance, skills competency, Electronic Medical Record applications, safety and sexual harassment prevention.

ETP funds will allow EHH to strengthen its curricula, continue to implement initiatives to comply with CMS updates, and train current staff to increase their 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

EHH has a detailed training plan and is ready to start upon approval. The Director of Clinical Home Health Operations will oversee and manage all administration and implementation of training. EHH retained an administrative subcontractor to assist with ETP project administration. Staff at each facility will oversee training and designate a staff member to assist with the administration, such as collecting and submitting completed attendance rosters to the administrative subcontractor for data entry into the ETP systems. Training will be delivered by in-house experts and vendors as needed.

Full-time Employment

A full-time EHH healthcare employee is regularly scheduled to work at least 30 hours each week. For benefits eligibility purposes, these full-time workers are eligible to receive or earn any benefits and/or other company-provided benefits program. All trainees are full-time, permanent employees who have flexible work schedule with at least 30 hours a week.

EHH requests to revise the standard full-time employment from 35 hours to 30 hours per week for all nurses and allied healthcare staff (Therapist/Assistant and Medical Social Worker) included in the proposed training plan. The Administrative Support Staff will meet the 35-hour workweek requirement.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

National Training Systems, Inc. (NTS) in Ladera Ranch assisted with development for a flat fee of \$18,133.50.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined

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

8 – 200 Trainees may receive any of the following:

COMPUTER SKILLS

- Clinical Services System Management
- Electronic Medical Records Application Skills
- Kinnser
- Consolo
- ICD-10 Coding
 - OASIS
- MS Office Suite Skills (Intermediate & Advanced Only)
 - Word
 - Excel
 - PowerPoint

CONTINUOUS IMPROVEMENT

- Communication Skills
- Coordination of Care
- Customer Service
- Compliance Procedures
- Documentation Skills
- Environmental Safety for Patients
- Interdisciplinary Team Process
- National Patient Safety Goals
- Outcome Based Quality Improvement
- Preceptor Skills
- Problem Solving
- Team Building
- Quality Assessment and Improvement

MEDICAL SKILLS TRAINING (DIDACTIC)

- Advanced Cardiac Life Support
- Activities of Daily Living
- Advanced Directives
- Annual Skills Update
- Arterial Blood Gas Interpretation
- Assessing Cardiac Changes
- Assessing Respiratory Function
- Basic Life Support
- Behavior Management
- Body Mechanics
- Cardiac Conditions
- Care of the Pleurx Patient
- Case Management
- Central Venous Access Devices
- Clinical Skills Lab
- Death and Dying
- Dementia Care

- Depression
- Diabetic Management
- Disease Management
- Disaster & Emergency Preparedness for Patients
- Discharge Planning
- Electrolyte Imbalance
- Elder Abuse
- Enteral Feeding Tube Management
- End of Life Care
- Equipment Skills
- Functional Mobility Assessment
- Gastrointestinal Assessment & Management
- Grief and Bereavement
- Handling of Death in a Home
- Hazardous Materials
- Home Healthcare Skills
- Hospice Skills
- Incontinence Management (Colostomy Care, Urinary Catheter)
- Infection Control
- Intravenous Therapy
- Infusion Therapy
- Influenza Vaccination
- Joint Replacement Care and Outcomes
- Medication Administration & Management
- Medical Social Worker Skills
- Multiple Sclerosis
- Neurological Assessment/Conditions
- Occupational Therapy Skills
- Orthopedic Conditions
- Pain Management (Acute & Chronic)
- Palliative Care
- Parkinson Care
- Patient Assessment & Care
- Patient Fall Prevention
- Patient Transfer Techniques
- Patient Safety
- Physical Therapy Skills
- Preventing Abuse
- Pressure Ulcers
- Point-of-Care Laboratory Testing
- Psychological and Spiritual Issues Related to Death and Dying
- Rehabilitation Skills
- Respiratory Care
- Skin Assessment
- Speech Therapy Skills
- Supplies, Medical Gasses and Drugs
- Symptom Management Stoplight Tools
- Tracheotomy Care
- Urinary Management (Foley Catheter, Input/Output)

- Wound Management
- Wound Vac Therapy

MEDICAL SKILLS TRAINING (CLINICAL W/PRECEPTOR)

- **Rehabilitative Services**
 - Patient Assessment & Care
 - Case Management
 - Clinical Skills Lab
 - Dementia Care
 - Diabetic Management
 - Enteral Feeding Tube Management
 - Equipment Skills
 - Infection Control
 - Intravenous Therapy
 - Medication Administration & Management
 - Rehabilitation Skills

- **Therapy Services**
 - Body Mechanics
 - Functional Mobility & Ambulation
 - Infection Control
 - Neurological Conditions
 - Occupational Therapy Skills
 - Orthopedic Conditions
 - Patient Assessment & Care
 - Physical Therapy Skills
 - Rehabilitation Skills
 - Speech Therapy Skills

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



RETRAINEE - JOB CREATION
Critical Proposal Proposal for:
Meggitt (San Diego), Inc.

Agreement Number: ET18-0235

Panel Meeting of: May 24, 2018

ETP Regional Office: San Diego

Analyst: R. Swier

PROJECT PROFILE

Contract Attributes:	Critical Proposal Job Creation Initiative Priority Rate Retrainee	Industry Sector(s):	Manufacturing Aerospace and Defense 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: 2,500	U.S.:7,100	Worldwide: 11,000
<u>Turnover Rate:</u>	5%		
<u>Managers/Supervisors:</u> (% of total trainees)	9%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$681,000		\$0	\$0		\$681,000

In-Kind Contribution:	100% of Total ETP Funding Required	\$948,790
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Critical Proposal Priority Rate	Business Skills, Computer Skills, Continuous Impr, Manufacturing Skills, HazMat, PL-Mfg Skills	233	8-200	0-100	\$1,800	*\$17.03
				Weighted Avg: 100			
2	Job Creation Critical Proposal Priority Rate	Business Skills, Computer Skills, Continuous Impr, Manufacturing Skills, HazMat, PL-Mfg Skills	109	8-200	0-100	\$2,400	*\$14.19
				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: \$17.03 per hour and Job Number 2: \$14.19 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 \$2.50 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Accountant		2
Coordinator		6
Composite Technician		169
Customer Service		1
Engineer 1		10
Engineer 2		14
Engineer 3		6
Technician		6
Financial Analyst		2
Human Resources		2
Health, Safety & Environmental Specialist		1
Material Lead/Handler		5
Production		44
Manager		23
Supervisor		6

Quality Inspector		33
Senior		11
Site Director		1

INTRODUCTION

Incorporated in 1980 and headquartered in Simi Valley, Meggitt-USA, Inc. manufactures electronics and aerospace products, including flight displays and avionics instruments, unmanned aerial vehicle ducting and sealing products, and aerospace fire detection systems. Industries served include aerospace/aeronautics, engineering, electronics, law enforcement, civil aviation, medical, oil, automotive, petrochemical, marine, and government industries. Meggitt-USA, Inc. is the parent company for Meggitt subsidiaries, all which operate independently.

Meggitt (San Diego), Inc. operates in the polymers and composites division, designing and manufacturing advanced composites for commercial and military aircraft suppliers. Products are used in bleed air and advanced electro-thermal solutions that protect engines and tail and rotor blades and in aircraft interiors (acoustic panels and blankets that suppress noise; ducts for environmental control systems; and support covers for protection of electronics, hydraulic lines, etc.).

This is Meggitt (San Diego), Inc.'s first ETP proposal. This training proposal will only target Meggitt (San Diego), Inc. workers. Meggitt (North Hollywood) Inc.; Meggitt Safety Systems, Inc.; and Meggitt (San Juan Capistrano) Inc. have held prior ETP Agreements.

Critical Proposal

This proposal for Meggitt (San Diego), Inc. (Meggitt) has been designated a Critical Proposal by the Governor's Office of Business and Economic Development based on Meggitt's planned business expansion/commitment to adding new jobs in California.

PROJECT DETAILS

Meggitt relocated to a single 120,000 sq ft facility less than a quarter mile away from its current two locations in the Sorrento Valley/Mira Mesa area of San Diego. This expansion is an additional 50,000 sq. ft. larger than the combined previous operations. The relocation investment of approximately \$10 million will result in over 200 new jobs by 2023 for Technicians, Managers, and Manufacturing and Quality Engineers. The older locations will close operations at the end of their respective leases.

The expansion is to serve two purposes: consolidate two facilities into one larger facility and allow flexibility for greater expansion. The new facility will allow significant efficiency improvements, thereby making Meggitt products more competitive and increased opportunity, thus creating jobs. In order to meet these growth expectations operational training is needed companywide. Existing staff will need to capture and transfer existing product technology skills and process methods from the smaller San Diego locations to the new larger facility. Additionally, the staff will require training in new advanced manufacturing processes.

Furthermore, Meggitt is having a difficult time attracting skilled talent and must hire employees with no experience. The Company's processes are complicated, which requires newly hired employees to enroll in extensive training programs to meet production standards.

Training Plan

Due to substantial growth in new and prospective business, Meggitt is implementing changes to its existing San Diego operations. Meggitt request ETP funds to train 233 incumbent workers and 109 newly hired employees for classroom, simulated laboratory, Productive Lab (PL), and Computer-Based Training (CBT) methodologies training in the following:

Business Skills – Training will be offered to key leadership and existing job classifications. Training will give employees skills to manage projects more effectively while serving customers in a more efficiently. Trainees will learn strategic planning, coaching and mentoring, leadership, and management skills.

Computer Skills – Training will be offered to back office support staff to improve their organizational and management effectiveness. This will insure that all occupations will be able to utilize internal computer systems to interact with customers and track day-to-day production and inventory activities.

Continuous Improvement – Training will be offered to all occupations but focused on existing workforce, with emphasis on supporting all aspects of the recently adopted Meggitt Production Schedule (MPS). This training will enhance workforce creativity and engagement and facilitate Six Sigma Green and Yellow certifications. These modules are also designed to improve on-time delivery and inventory turns while reducing defects.

Manufacturing Skills – Training will be offered to all occupations in classroom and productive lab settings to strengthen the Company's manufacturing processes. This training is designed to improve worker efficiency, reduce errors, and expand the company's overall production capabilities. The focus will mainly be to develop new hires in all aspects of Meggitt's advanced manufacturing processes.

Hazardous Materials - Training will be provided to new employees in Operations/Productions and Engineering Staff. Training in will cover proper hazardous materials handling and waste management.

Computer Based Training – Training will be offered to all occupations through a series of short demonstration-oriented videos and graphics coupled with testing on fundamental skills required to work at Meggitt.

Productive Laboratory (PL)

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

PL training will be provided to Production and Manager trainees in Manufacturing Skills. PL is the most effective way for trainees to fully comprehend highly detailed and precise production processes and complex technology equipment. Meggitt estimates some trainees will need over 200 hours of PL; However, most trainees will receive an average of 60 hours. Training will be at a 1:3 trainer-to-trainee ratio (majority of PL will be 1:1) because some equipment will require small groups of three employees to operate.

PL will include hands-on instruction in the manufacturing methods and practices, for both incumbent and newly hired trainees, as trainees must acclimate to Meggitt's upgraded technology and new location. Newly hired trainees will spend much of their time in one-on-one training at the beginning, delivered directly by the site training manger. Trainees will be formally evaluated using a checklist of competencies.

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.

Meggitt is expanding business capacity by hiring new employees due to expansion of its facilities. Meggitt has committed to hiring 109 new employees (Job Number 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into “net new jobs” as a condition of contract.

Commitment to Training

Meggitt has an annual training budget of approximately \$150,000 for its San Diego facilities. Company-funded training includes company orientation, sexual harassment prevention, and military defense contractor training. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

Meggitt will utilize a team of nine (9) staff to administer the program including leadership in the finance, human resources, operations, quality and engineering departments. Also, a dedicated training manager and outside consultant to help ensure compliance. The majority of the training will be delivered by in-house instructors.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

United Capitol Partners located in Southlake, TX developed the proposal for no fee.

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

- Business Continuity
- Coaching & Mentoring
- Communication Skills
- Conflict Resolution
- Delegation
- DISC Assessment Learning
- Frontline Leadership
- Leadership Development
- Management Development
- Meggitt Competencies
- Negotiation Skills
- Performance Management
- Presentation Skills
- Time Management
- Train-the-Trainer

COMPUTER SKILLS

- M2M (ERP) Training
- Material Requirements Planning (MRP)
- Microsoft Office Suite (Intermediate & Advanced)
- SmarTeam Product Life Management Software
- SolidWorks Solid Modeling Software
- Time Accounting System

CONTINUOUS IMPROVEMENT

- Lean Manufacturing
- Inventory Accuracy Program Procedures
- ISO 9000 Skills
- Kaizen Leader Development
- Kaizen Process Improvement Workshops
- KanBan Process
- Leadership/Management Communications & Meetings
- Lean Assessment
- Lean Enterprise System Overview
- Material Resource Planning
- Meggitt Business Process
- Meggitt High Performance Culture (HPC)
- Planning Process Skills
- Policy Deployment
- Problem Solving Skills
- Process Deployment
- Process Improvement Skills

- Process Mapping
- Pull Systems
- Quality Management Systems
- Quality Standards Process
- Set-Up Time Reduction
- Simulation Modeling Skills
- Six Sigma Skills
- Standard Work Skills
- Statistical Process Control
- Strategic Planning Skills
- Team Building Skills
- Total Process Improvement
- Total Productive Maintenance (TPM) Skills
- Value Stream Mapping
- Visual Management

MANUFACTURING SKILLS

- Basic Product Assembly
- Bonding process
- Bulk molding
- Calibration and Adjustment
- Compression molding
- Cure profiles
- Deflashing Technics
- Demand Flow Technology
- Equipment Set-Up and Operation
- Equipment Troubleshooting and Preventative Maintenance
- FOD prevention
- Forklift Operations
- Job Travelers and Production Flow
- Meggitt Production System (MPS)
- Mixing of adhesives
- New & Revised Standard Operating Procedures (SOP)
- Ply orientation
- Post-cures
- Preventative Maintenance Skills
- Product Fulfillment Process
- Production and Inventory Management
- Quality Inspection
- Root Cause Analysis
- RTM
- Small Batch Manufacturing
- Types of material – weaves
- Vacuum Bagging
- Visual inspection of parts

HAZARDOUS MATERIALS

- Hazardous Material Handling
- Waste Management
- Hazardous Emergency Response
- Hazardous Safety Refresher/Chemical Fires

Productive Lab Hours

0-200

MANUFACTURING SKILLS

- Basic Product Assembly
- Bonding process
- Bulk molding
- Calibration and Adjustment
- Compression molding
- Cure profiles
- Deflashing Technics
- Equipment Set-Up and Operation
- Equipment Troubleshooting and Preventative Maintenance
- FOD prevention
- Forklift Operations
- Job Travelers and Production Flow
- Mixing of adhesives
- Ply orientation
- Post-cures
- Preventative Maintenance Skills
- Quality Inspection
- Small Batch Manufacturing
- Visual inspection of parts

CBT Hours

0-100

MANUFACTURING SKILLS

- AC 7118.10 Control/Revalidation Testing (standard number of hours = .33)
- AC 7118.4 General Quality System Requirements (.33)
- AC 7118.5 Material Control (1)
- AC 7118.6 Facilities and Equipment (1)
- AC 7118.7 Tooling (.75)
- AC 7118.8 General Fabrication Procedures (A/B) (.75)
- AC 7118.9 Trimming and Drilling (1)
- CPO-SAFT-0013 LockOut/Tagout (.33)
- CPO-SOP-0113 Ply Cutting Verification (.25)
- CPO-SOP-0133 Tool Cleaning and Preparation (.25)
- CPO-SOP-0134 Cure Interpretations (.5)
- CPO-SOP-0135 Bagging and Curing of Aviation Product (.25)
- MCOM-1 Trimming and Drilling Composites (.5)
- MCOM-3 Order Management (.25)
- MENG-2 Engineering Design Review (.5)

- MENG-3.5 Design Configuration Management (.33)
- MFT-19 Site Quality Matrix (.5)
- MFT-20 GQMS Group Matrix (.25)
- MOPS-1 Operation KPI's (.25)
- MOPS-12 Product Performance Issues Escalation (.5)
- MOPS-14 Control of Production (.5)
- MOPS-15 Customer Property (.25)
- MOPS-16 Control of Production Equipment tools and Software (.25)
- MOPS-17 Identification And Traceability (.33)
- MOPS-3 Inventory and Operations Planning (1)
- MPC-SOP-0087 Workplace Organization 6-S (.5)
- MPC-SOP-0093 Controlled Contamination Area CCA & EMA Req's (.75)
- MPC-SOP-0119 Procurement Responsibilities (.5)
- MPC-SOP-0130 Thermal Profiling of Tools (.5)
- MQA-18 Quality Manual (.75)
- MSDCI-10.3 Continual Improvement (.5)
- MSDOPS-7.1.3 Business Continuity Support Plan San Diego CA (.5)
- MSDOPS-8.5.4 Preservation (.5)
- MSDQA-10.2 Nonconformity and Corrective Action (1)
- • MSDQA-8.5.1.3 Production Process Verification (.25)
- MSDQA-9.1 Monitoring Measurement, Analysis and Evaluation (.25)
- MSSM-2 Program Lifecycle Management (.25)
- PRC-10 Meggitt Group Supplier Quality Requirements (.25)
- PWA-104 Controlled Environment Room (.5)

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
Orange County Global Medical Center, Inc.
17-0802

Panel Meeting Date: 05/24/2018
Regional Office: San Diego Regional Office
Analyst Name: Maria Ibarra
Type of Proposal: Single Employer
Funding Source: SET

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$425,700.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$491,040.00	N/A	\$65,340 (30% - Santa Ana)	\$500,000.00

APPLICANT PROFILE

Company Summary	KPC Group own businesses in healthcare, pharmaceuticals, education, engineering, and real estate. The Company's healthcare division, KPC Health (www.kpchealth.com), has an established group of integrated healthcare delivery systems consisting of acute care hospitals, Independent Physicians Associations (IPAs), medical groups, urgent care facilities, and various fully integrated multi-specialty medical facilities throughout California.
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Industry Sector(s)	Healthcare		
Priority Industry	Yes		
No. Employees (Applicant)	State: 2,406	US: 2,406	World Wide: 2,406
Turnover Rate (Applicant)	17.00%		

Repeat Contractor	Yes
High Unemployment Area	No
Union(s)	California Nurses Association / SEIU United Healthcare Workers-West

TRAINING PROFILE

Training Objective(s)	Through four of its acute care hospitals, KPC Health plans to deliver a comprehensive training package to its nurses and other allied healthcare staff in various Computer, Continuous Improvement, and Medical Skills training. Training will provide workers with improved skills in all areas of patient care to successfully support the Hospitals' new and upgraded programs and services to remain in compliance with changing regulatory standards while maintaining a high level of patient care and overall patient satisfaction.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee*	Min-Max Hours
1	Retrainee	496	\$ 18.00	55	\$ 990	8 - 200

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

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 2003 and headquartered in Santa Ana, KPC Health operates seven autonomous acute care hospitals located throughout Southern California. Orange County Global Medical Center, Inc. (Orange County Global) will be the lead affiliate contract holder with three other KPC Health affiliated hospitals participating in this project: Anaheim Global Medical Center (Anaheim Global); South Coast Global Medical Center, Inc. (South Coast Global); Chapman Global Medical Center, Inc. (Chapman Global).

All four affiliates have participated in prior ETP projects (see Previous ETP Project Summary section). The hospitals are located in the cities of Anaheim, Santa Ana, and Orange. Accredited by the Joint Commission on Accreditation of Hospital Organizations, the hospitals have a total of 763 licensed beds and provide medical/surgical, obstetric, geriatric, psychiatric, radiology, respiratory therapy, clinical laboratory, pharmacy, and physical/occupational therapy services on an inpatient/outpatient basis. Orange County Global is also designated as a burn center; neurosurgical, stroke, and paramedic base station receiving center; and open-heart surgical center that provides emergency and scheduled neurosurgical care and cardiac surgical services to economically depressed area population.

The Hospitals are eligible for ETP funding under Special Employment Training (SET) provisions for frontline workers.

2. Current Training Project Details

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

Purpose of Training

In its previous ETP projects, each hospital was able to provide critical skills training to its incumbent and newly-hired experienced Registered Nurses (RNs) and other allied healthcare staff necessary to assume responsibilities working in specialized units. The hospitals were able to provide in-depth Medical Skills (MS) training to New Graduate RNs filling key positions vacated by retired nurses. Training supported strategic plan to keep pace with technological advancements, improve patient care, increase nurse retention rates, as well as maintain certification requirements to support continuous quality healthcare improvements.

Hospital administrators reported that KPC Health faces ongoing and uncertain regulatory changes with the current Affordable Care Act and future changes to the healthcare system. The prospective healthcare law will reduce medical reimbursement from Medicaid and private insurance companies as well as reduce Medical payments to hospitals that provide lower-quality service or have high admission rates. Consequently, the healthcare reform will result in an increased patient population, staffing requirements, and cost levels.

PROPOSED TRAINING PROJECT DETAILS

	<p>To address these challenges, the Hospitals must continue to focus on keeping pace with changing clinical protocols brought by the aforementioned legislative regulations and standards. In order to successfully support regulatory changes and remain in compliance, Orange County Global has committed to implement the following technological advancement and process improvements in the next two years:</p> <ol style="list-style-type: none"> 1. Implementation of ICD-10 coding upgrades, mandated by the Center of Medicare and Medicaid Services (CMS), to be used by all business staff and medical coders for accurate billing; 2. Full implementation of the Company’s Electronic Medical Records (EMR) to comply with Meaningful Use required by CMS and Accountable Care Organizations; 3. New technology and equipment in Intensive Care, Emergency Department, Catheterization Laboratory, and Electrophysiology Units; and 4. Continue to fill positions that will soon be vacated by nursing workforce nearing retirement age, specifically, in the Hospitals’ specialized units such as Obstetrics, Intensive Care, Emergency, and Operating Room. <p>Further, in this proposal, the hospitals will continue to achieve their business goals of maintaining a high performing workplace, improved patient care, and the promotion of employee skills. Some training provided in previous contracts will be provided in this training plan. However, training will not be delivered to the same incumbent workers that participated in prior contracts. The proposal’s Agreement amount reflects both the need and achieved cumulative past earnings.</p> <p>In this proposal, Company representatives conservatively assessed the proposed agreement amount (\$425,700) to be closely in line with the training needs for all four hospitals. In the past ETP Agreements, the four Hospitals have had separate contracts, with the two most recent contracts in the amount of \$475,900 (Orange County Global) and \$315,540 (Anaheim Global, South Coast Global, and Chapman Global), for a total of \$791,440.</p>
<p>Training Infrastructure and Administrative Plan</p>	<p>Orange County Global’s Contracting Manager will oversee the overall ETP project as well as meet with ETP staff during monitoring activities. The Company will also designate each hospital’s Education Department Staff to schedule and implement training as well as designate other administrative staff to enroll trainees; collect and maintain training rosters; and track training hours in the ETP online system. Training will be delivered by in-house trainers. The services of a training vendor may be attained at a later date if the need arises.</p>

PROPOSED TRAINING PROJECT DETAILS

Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	All four hospitals have participated in prior ETP Agreements. Orange County Global (Santa Ana) is the only repeat contractor with payment earned (incumbent earnings) in excess of \$250,000 at the same location within the last five years (see Past Contract Activity Table). Orange County Global had a prior Substantial Contribution of 15% (for the Santa Ana facility). Accordingly, reimbursement for trainees (all incumbent retrainees) at this facility will be reduced by 30%, to reflect the Hospital's \$65,340 Substantial Contribution to the cost of training.

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
Training in Computer, Continuous Improvement, and Medical Skills will be provided to approximately 496 existing and newly-hired healthcare workers.	

Delivery Method/Level	Productive Laboratory
Summary	
Training in Medical Skills delivered by a Clinical Preceptor will be provided to approximately 496 existing and newly-hired healthcare workers.	

4. Additional Company or Training Project Details

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

Medical Skills

This program provides funding for nurses and allied healthcare occupations with a Reimbursement Rate of \$22 for clinical didactic training and clinical preceptor model.

Medical Skills (MS) training is crucial in supporting the hospital's new and upgraded healthcare programs and services as well as meeting new regulations and standards concerning quality, safety, and transparency. Approximately 370 Registered Nurses (including 53 New Graduate RNs), 42 Licensed Vocational Nurses (LVNs), 36 Respiratory Therapists, 23 Radiology/MRI Technicians, and 16 Pharmacists will participate in Clinical Preceptor and Didactic training classes. MS will primarily be delivered to New Graduate RNs and those new to a specialized department or position.

PROPOSED TRAINING PROJECT DETAILS

SET Priority Industry Wage Modification

For trainees employed in a priority industry, the Panel may modify the SET wage up to 25% below the statewide average hourly wage from \$30.36 to \$22.77. This wage modification is intended to train healthcare workers in lower wage occupations to provide opportunities for wage increases and long-term job security.

4.1 Program Waivers

No waivers have been applied to this proposed project.

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	None selected to date	N/A	N/A
Administrative	None selected to date	N/A	N/A
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

This table summarizes Orange County Global's (Santa Ana) performance under prior ETP contract(s) completed within the last five years.

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
*ET15-0171	Santa Ana (Orange County Global)	7/7/14 – 7/6/16	\$475,900 (15% SC applied)	\$335,080 (incumbent earnings \$76,685)	70%
ET12-0299	Santa Ana (Orange County Global)	2/6/12 – 2/5/14	\$325,752	\$285,666 (incumbent earnings \$145,627)	88%
*Note	<i>Cumulative incumbent earnings for ET12 and a prior project (within the last five years at the time) were in excess of \$250K at this facility. Therefore, a 15% Substantial Contribution was applied in the subsequent ET15 for the Santa Ana facility.</i>				

PROPOSED TRAINING PROJECT DETAILS

This table summarizes Anaheim Global (Anaheim), South Coast Global (Santa Ana), and Chapman Global's (Orange) performance under prior ETP contract(s) completed within the last five years.

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
ET14-0243	Anaheim, Santa Ana (South Coast Global), and Orange	12/16/13 – 12/15/15	\$315,540	\$224,042 (incumbent earnings \$76,140)	71%

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	Planned Course Offerings
Computer Skills (Standard)	Computerized Radiography (CR)
	Demand Interim Claim
	Electronic Health Records Application Skills
	Epemis: Clearing House
	Learning Management System
	Microsoft Office/Excel Skills (Intermediate and
	Paragon Order Entry Skills
	Patient Billing and Accounts Receivable Tracking
	Payor Selection/Reclass/Rev/Recls Proc
	Reports (Statistical/ATB)
	UB04
	Workqueue Proc
	Continuous Improvement Skills
Charge Nurse Training/Frontline Leadership Skills	
Communications Skills	
Core Measures	
Crisis Prevention Intervention (CPI)	
Critical Thinking Skills	
Culturally Appropriate Care	
Customer Service Skills	
Documentation Skills	
Hospital Emergency Management for Patients	
Lean Six Sigma	
Organization and Time Management Skills	
Patient and Family Centered Care Skills	
Performance and Quality Improvement and Procedures Skills	
Preceptor Skills (train-the-trainer)	
Team Building Skills	
Utilization Review	
Medical Skills (didactic)	Acute Myocardial Infarction
	Acute Psychiatric Care
	Advanced Cardiac Life Support (ACLS)
	Arterial Blood Gas (ABG) Interpretation
	Basic Life Support (BLS)
	Behavioral Health Nursing Skills
	Body Mechanics
	Care of Bariatric Patient
	Care of Pediatric Patients
	Care of Spine Patient
	Care of the Cardiac Patient
	Care of the Neurosurgical Patient

Attachment 2 - Training Delivery and Curriculum Listing

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

Care of the Stroke Patient
CCRN Prep Course
CEN Prep Course
Central Lines Management
Chest Tube Care and Management
CNOR Prep Course
Code Blue Response and Procedures
Correctional Health Safety Protocols
CPAN Prep Course
Critical Care Nursing Skills
Critical Care Training Program
Critical Results Management
CVRN Prep Course
Decontamination Procedures
Diabetes Care and Management
Diabetes Education Training
Dysrhythmia Recognition and Interpretation
Educating the Patient and Family
EKG and Cardiac Monitoring
Electronic Fetal Monitoring (Beginning and Advanced)
Emergency Care of the Burn Patient
Emergency Room Nursing Skills
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
Infection Control
Intra-Aortic Balloon Pump Therapy (IABP)
Intra-Cranial Pressure Monitoring and Ventriculostomy
Intravenous (IV) Insertion and Therapy
Kinetic Therapy
Labor, Delivery, and Postpartum Nursing Skills
Management of the Renal Transplant Surgical Patient
Medical/Surgical Nursing Skills
Medication Administration and Management
Moderate Sedation
Neonatal Advanced Life Support (NALS)
Neonatal Intensive Care Unit (NICU) Nursing Skills
Neonatal Nursing Skills
Neonatal Resuscitation Provider (NRP)
Neonatal/Infant Pain Scale (NIPS)
New Graduate Nursing Skills
Nurse Orientation Training (for New Grads only)

Attachment 2 - Training Delivery and Curriculum Listing

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

Nursing Diagnosis Skills
Nursing Process Skills
OB Skills
Oncology Nursing Skills
Orthopedic Nursing Skills
Ostomy and Continence Care
Outcome Skills
Pain Management (Acute and Chronic)
Palliative Care
Patient Assessment and Care
Patient Fall Prevention
Pediatric Advanced Life Support (PALS)
Peri-operative Nursing Skills
Photographic Archive Communications System (PACS)
PICC Line Insertion
Pre and Post Operative Care
Psychiatric Nursing Skills
Psychotropic Medications
Rapid Response Skills
Renal Assessment and Management
Respiratory Assessment and Care
Restraints
S.T.A.B.L.E.
Surgical Nursing Skills
Telemetry Nursing Skills
Total Parenteral Nutrition (TPN)
Transfer Techniques
Trauma Nursing Skills
Triage Nursing Skills
Ventilator and Tracheotomy Care
Wound and Skin Care

<i>Delivery Method /Level</i>	<i>Productive Laboratory</i>
Training Type (Level)	Planned Course Offerings
Medical Skills (preceptor)	Antepartum, Labor, Delivery, and Postpartum Skills
	Bariatric Nursing skills
	Cardiac Nursing skills
	Care of Dialysis Patient
	Care of the Cardiac Patient
	Care of Trauma Patient
	Care of Ventilator Patient
	Critical Care Nursing Skills
	Dysrhythmia Interpretation
	EKG and Cardiac Monitoring

Attachment 2 - Training Delivery and Curriculum Listing

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

Electronic Fetal Monitoring
Geriatric Nursing Skills
Hemodynamic Monitoring
Hospice Nursing Skills
Intra-Aortic Balloon Pump (IABP) Therapy
Intracranial Pressure Monitoring and Ventriculos
Intravenous (IV) Therapy
Management of the Renal Transplant Surgical Patient
Med/Surg Nursing Skills
Medical/Surgical Nursing Skills
Neonatal Advanced Life Support
Neonatal Intensive Care Unit (NICU) Nursing Skills
Neonatal Nursing Skills
Neonatal Resuscitation Provider (NRP)
Neonatal/Infant Pain Scale (NIPS)
Oncology Nursing Skills
Orthopedic Nursing Skills
Palliative Care
Patient Assessment and Care
Peri-operative Nursing Skills
Post-Neurological Injury Nursing Skills
Post-Orthopedic Surgery Nursing Skills
Post-Trauma Injury Nursing Skills
Pre & Post Procedure care of Cardiac Patient
Pre and Post Operative Care
S.T.A.B.L.E.
Spine Nursing skills
Telemetry Nursing Skills
Total Parenteral Nutrition – Med Surg
Tube Feeding
Use of Lift Devices
Ventilator and Tracheotomy Care
Wrong Site Surgery Prevention

PL Justification and Details

Explain the need for productive laboratory (PL) training	Productive Laboratory (PL) is essential for high quality outcomes in our field of healthcare. Hands-on learning and training from experts in the field are a must when it comes to the care of actual patients. Only through PL, can employees be trained in the same setting and utilize the same tools in order to be successful on their own. PL also allows trainees to work side by side their trainer and be given direct and automatic feedback on the spot. These types of trainings supplement the classroom
Describe the Equipment/Processes to be used in delivering the PL training	Some equipment that may be used include ventilators, lifts, pumps, monitors, restraints, EKG machines, etc.
Describe Trainer Qualifications	Trainers are experts and licensed in their respective fields with leadership/mentorship roles and responsibilities.

Trainer to Trainee Ratios - If more than one PL class the ratios are the lowest and the highest trainer-to-trainee ratio	Trainer	Trainee
Ratio for One Class, or Minimum When More than One Class	1	1

Attachment 2 - Training Delivery and Curriculum Listing

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

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



CALIFORNIA
NURSES
ASSOCIATION

A Voice for Nurses. A Vision for Healthcare.



National
Nurses
United

OAKLAND

2000 Franklin Street
Oakland CA 94612

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fax: 510-663-2771

LOS ANGELES

225 West Broadway
Suite 500

Glendale CA 91204

phone: 818-240-1900

fax: 818-240-8336

July 25, 2017

Employment Training Panel
1100 J St.
Fourth Floor
Sacramento, CA 95814

To Whom It May Concern:

This letter is to confirm the support of the California Nurses Association/National Nurses United for KPC Health grant proposal as submitted to the Employment Training Fund.

Sincerely,

A handwritten signature in blue ink that reads "Janet Jones".

Janet Jones
Labor Representative
California Nurses Association



5480 Ferguson Drive
Los Angeles, Ca. 90022

Phone: (323)-236-0534
Fax: (323)-721-3538

**RETURN RECEIPT REQUESTED
U.S. CERTIFIED MAIL**

July 26, 2017

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

Sir/Madam:

I'm writing on behalf of SEIU United Healthcare Workers-West. Our Union represents the service, business clerical and technical bargaining unit employees in Chapman Global Medical Center, South Coast Global Medical Center and Anaheim Global Medical Center. We support the application for training funding being submitted to the Employment Training Panel by and on behalf of these hospitals. We fully expect the employer to use the funds on relevant trainings that will assist our members in upgrading their skills which are critical to maintaining quality patient care.

Please contact me if you any further questions.

Respectfully,

A handwritten signature in black ink, appearing to read "Ferdinand Silerio", enclosed in a thin black rectangular border.

Ferdinand Silerio
Coordinator II
Hospital Division

Cell: (213) 716-6734

Fax: (323) 721-3538

E-mail: fsilerio@seiu-uhw.org

Cc: Carlos Magdaleno, Union Representative
Ferdinand Silerio, Coordinator
Noemi Beas, Assistant Director



RETRAINEE - JOB CREATION
Training Proposal for:
Orora Packaging Solutions
Agreement Number: ET18-0225

Panel Meeting of: May 24, 2018

ETP Regional Office: San Diego

Analyst: H. Bernard

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee Job Creation Initiative HUA	Industry Sector(s):	Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Alameda, Los Angeles, Orange, San Diego, Ventura, Fresno, Napa, Placer, San Bernardino, San Joaquin, San Luis Obispo, Monterey	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Teamsters District Council No. 2, Local 388M & Teamsters Local Union No. 63		
Number of Employees in:	CA: 1,403	U.S.: 2,318	Worldwide: 6,700
<u>Turnover Rate:</u>	12%		
<u>Managers/Supervisors:</u> (% of total trainees)	8%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$750,000		\$0	\$0		\$750,000

In-Kind Contribution:	100% of Total ETP Funding Required	\$1,356,367
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate HUA	Business Skills Computer Skills Cont. Imprv. HazMat Mfg. Skills PL - Mfg Skills Advanced Tech	950	8-200	0	\$720	\$12.53
				Weighted Avg: 40			
2	Retrainee Priority Rate Job Creation Initiative	Business Skills Computer Skills Cont. Imprv. HazMat Mfg. Skills PL - Mfg Skills Advanced Tech	55	8-200	0	\$1,200	\$13.66
				Weighted Avg: 60			

It will be made a condition of contract that the trainees in Job Numbers 1 & 2 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: Alameda County: \$18.22/hr.; Los Angeles County: \$17.54/hr.; Orange County: \$17.50/hr.; San Diego County: \$17.03/hr.; Fresno, Monterey, Napa, Placer, San Bernardino, San Joaquin, San Luis Obispo and Ventura Counties: \$16.70/hr.; HUA - Fresno, Monterey and San Joaquin Counties: \$12.53 Job Number 2: Alameda County: \$15.18/hr.; Los Angeles: \$14.62/hr.; Orange County: \$14.58/hr.; San Diego County: \$14.19/hr.; Napa, Placer, San Bernardino, San Luis Obispo and Ventura Counties: \$13.66/hr.

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

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

Other Compensation: Sales Staff may earn commissions ranging from \$8.98 to \$17.51 per hour to meet or exceed the ETP minimum hourly wage.

**The Company is not in Retail trade. As such, occupations paid by commission do not fall under the Panel's "Lowest Priority" for FY2017/18.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Administration/Support Staff I		92
Administration/Support Staff I I		112
Customer Service Staff		57
Information Technology Staff I		25
Information Technology Staff II		8

Manufacturing/Shipping/Receiving		486
Sales Staff		92
Managers I		40
Managers II		38
Job Number 2		
Administration/Support Staff		11
Customer Service Staff		4
Information Technology Staff		2
Manufacturing/Shipping/Receiving		22
Sales Staff		11
Managers		5

INTRODUCTION

Headquartered in Buena Park, Orora Packaging Solutions (OPS), is a nationwide manufacturing, distribution and logistics company. The Company manufactures corrugated paper products, packing material, janitorial products, shipping supplies, and custom-built corrugated packaging and industrial packaging products.

This will be OPS's fourth ETP project, its third in the past 5 years. Twenty-three facilities will participate in this project: Rocklin, Fontana, Montebello (2), Fullerton (2), Brea, Alhambra, Union City, Paso Robles, Fresno, Salinas, Buena Park (2), San Marcos (2), Cypress, Irvine, Tracy, Fairfield, Camarillo, and Newark (2).

OPS also maintains operations throughout the United States and Mexico and sells its products to a variety of large and small industries and companies, including Hewlett Packard, Boeing, and Unisys. The Company is eligible for standard, retraining funding at the priority-industry rate as a manufacturer.

OPS has production staff that are represented by Teamsters District Council 2, Local 338M and Teamsters Local Union No. 63, both of which have expressed support for this proposal.

PROJECT DETAILS

Past ETP projects focused on Product Knowledge, Communication, Customer Service and Computer Skills, including Salesforce software training. The most recent active project addresses Production Staff skill gaps, sales, customer service, and foundational training tied to the ERP rollout. This new project will focus on new technologies and equipment, new system implementation, change management and the final roll out of the ERP system.

Currently OPS is in a period of growth, projecting sales growth and corresponding workforce expansion by 15% over the next 2 years. The Company expects to increase capacity in the areas of food packaging and will accommodate these changes through upgrades to existing facilities & equipment at a cost of over \$7 million. Recently the Company acquired a Nozomi C18000 printer, which is industrial single-pass technology for corrugated materials. This printer is the first of its kind in North America, the size of a city block that can generate up to 60 billboards in one minute. One of these machines is being installed at the Company's location in Fullerton and a second will be installed in San Jose/Union City in late 2018. In addition to the Nozomi printer, OPS also

purchased new gluers, folders, lifters, cutters and die cutters at multiple locations across California.

OPS will also focus training efforts on the final implementation of its Enterprise Resource Planning (ERP) Software System which started in the current ETP project (ET17-0415). The ERP system rollout, started at smaller OPS facilities in the US and was intended to quickly transition across the country and conclude in California. California houses the largest number of OPS' employees and facilities. As such, any challenges faced in these smaller facilities would be magnified at the larger CA locations. Multiple issues were discovered during the rollout at these smaller sites which needed to be resolved before implementation. Due to delays, rollout of the system did not occur at the CA facilities until late 2017. As such, ERP training for staff at these facilities was limited the in prior ETP contract. In this ETP project, the Company will be providing additional necessary training to ensure all staff are knowledgeable and competent in the new system. However, no training that was provided in the previous projects on the ERP system will be duplicated in this project.

Retrainee - Job Creation

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

Due to the Company's expected growth and significant investments in new equipment and technology, OPS has committed to hiring approximately 55 new employees (Job Number 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

High Unemployment Area

Approximately 17 trainees (Job Number 1) work in a High Unemployment Area (HUA), a region with unemployment exceeding the state average by at least 25%. The Company's locations in Tracy, Fresno and Salinas (San Joaquin, Fresno and Monterey Counties respectively) are in HUA. However, OPS is not asking for a wage modification.

Substantial Contribution

OPS is a repeat contractor (as Orora North America and Orora Packaging Solutions) with payment earned in excess of \$250,000 at 22 California facilities within the past five years. Total incumbent earnings are as follows:

- ET12-0166: total earned was \$122,178.
- ET15-0286: total earned was \$449,883.
- ET17-0415: projected incumbent earnings are \$720,000, with \$484,335 currently approved as earned.

Although Orora has earned, approximately \$1,053,396 in incumbent training funds none of the 23 facilities included in this proposal have earned or may be projected to earn in excess of \$250,000 in incumbent funding. Therefore, the substantial contribution assessment does not apply.

Training Plan

Classroom/Laboratory, Advanced Technology and Productive Lab training will take place at the Company's 23 facilities throughout California. Training will focus on new equipment and the final implementation of the Company's ERP system. The following are some curriculum topics:

Business Skills: Communication Skills, Project Management Skills, Accounting Skills, Customer Service Skills, Procurement Skills

Computer Skills: ERP System, Inventory Control System, Production Control System, Salesforce, Orora Distribution System Skills

Continuous Improvement: Lean Operations, Process Improvement, Quality Assurance, Change Management, Leadership Skills

Manufacturing Skills: Manufactured Packaging Products Quality Processes, Equipment Set Up & Operations, Product Manufacturing

Hazardous Materials: Training will be provided to manufacturing and management staff in proper techniques and procedures required for safe handling and proper disposal of hazardous materials. No industry certification will be earned after training is completed.

Productive Laboratory (PL)

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

Training will focus primarily on new equipment including the Nozomi Digital Printer, gluers, folders, lifters, cutters and die cutters. Training will also focus on the ERP system.

The hands-on learning of PL is the best way to verify competency in the use of the new ERP system and new equipment. Troubleshooting by the trainer can be conducted in real time and will minimize errors, ensure proper use of equipment, and minimize potential for misuse or damage to these costly tools. Because trainers will be monitoring live interactions with customers they will be able to provide immediate feedback and corrective actions. The trainer to trainee ratio for PL training will not exceed 1:1.

Advanced Technology (AT)

AT training will include CAD/CAM, Adobe Creative Cloud & Captive Software Systems, and the Nozomi digital printer. These skills will be delivered to select manufacturing, administrative, sales and management staff who have the necessary experience and aptitude to learn these advanced skills. The hourly cost of training for these skills is \$28 to \$50 per hour. The trainer-to-trainee ratio is 1:10 to allow in-depth coverage and personal attention from the instructor.

Commitment to Training

ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law. The Company provides new employee orientation, anti-harassment training, diversity training, safety training and professional development training for its staff at its own expense.

➤ Training Infrastructure

The project will be overseen through the Company's Orora Global University training program with oversight by the Manager of Talent Development & Corporate Communications and the

Training and Development Coordinator. Staff at each location will be allocated to coordinate training. These staff members will assist with scheduling training and administrative processes. Orora has also retained California Manufacturing Technology Consulting (CMTC) to assist with administrative services including upload the ETP Online Systems.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0415	\$749,600	2/1/17 – 1/31/19	1,037	681	410

All training under this contract was completed on 2/16/18. ETP records indicate 682 trainees received training equivalent to over the Agreement amount of \$749,600 (100%). Orora has received earned payment of \$513,523 for 410 trainees who have completed retention.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned	
			\$	%	
ET15-0286	Statewide (22 facilities)	9/1/14 – 8/30/16	\$624,448	\$624,448 (100%)	
ET12-0166	Statewide (19 facilities)	11/21/11 – 11/20/13	\$153,900	\$122,178 (79%)	

DEVELOPMENT SERVICES

OPS retained CMTC in Torrance to assist with development of this proposal for a flat fee of \$15,000.

ADMINISTRATIVE SERVICES

CMTC will also perform administrative services in connection with this proposal 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

- Communication Skills
- Customer Service Skills
- Procurement Skills
- Accounting Skills
- Time Management Skills
- Customer Relationship Management Skills
- Project Management Skills
- Business Writing Essentials
- Managing Conflict
- Effective Presentations
- Sales Force Excellence/Effectiveness
- Train the Trainer for Sales Cycles
- Sales Leadership
- Sales Business Improvement
- Pocket Margin Profitability Skills
- Product Knowledge Skills

COMPUTER SKILLS

- Enterprise Resource Planning (ERP) System Skills – SAP
- Top Gun Inventory Control System Skills
- Orora Production Control System
- Pocket Margin Profitability Database Skills
- Salesforce Customer Relationship Management (CRM) System Skills
- Orora Distribution System Skills
- Microsoft Office – Intermediate/Advanced

CONTINUOUS IMPROVEMENT

- Research and Development/Product Design
- Lean Operations Skills
- Problem Solving/Conflict Resolution Skills
- Process Improvement Skills
- Quality Assurance Skills
- Sustainability Skills
- Change Management
- Leadership Skills
- Conflict Resolution Skills
- Leading Effective Meetings
- Teambuilding Skills
- Change Management Skills
- Financial Management Skills
- Supply Chain Management

HAZARDOUS MATERIALS

- Hazardous Materials Handling & Disposal

MANUFACTURING SKILLS

- Manufactured Packaging Products (MPP) Quality Processes
- Equipment Set Up/Operation
- Product Manufacturing
- Equipment Operation
- Electrical Safety
- Fire Safety

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

ADVANCED TECHNOLOGY (limited ratio 1:10)

- (CAD/CAM
- Adobe Creative Cloud
- Adobe Captivate
- Nozomi Digital Printer
- Flexo Folder Gluer with Die Cutter (FFG/DC)
- 4 Color Mid-Size Flexo with Robotic Prefeeder and Stacker (F/RPS)

PL Hours

0 – 60

PRODUCTIVE LAB (PL) (limited ratio 1:1)

- SAP
- Nozomi Digital Printer
- Flexo Folder Gluer with Die Cutter (FFG/DC)
- 4 Color Mid-Size Flexo with Robotic Prefeeder and Stacker (F/RPS)

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.



TEAMSTERS DISTRICT COUNCIL 2

Affiliated with the Graphic Communications Conference-International Brotherhood of Teamsters
Affiliated Local Unions 388M, 747M, 28N, 541S, 543M, 625S

Main Business Office

710 E. Commonwealth Avenue, Fullerton, CA 92831-3842
(714) 447-3382 Fax (714) 447-3385 (800) 333-4388

Northern California/Colorado/Utah/Nebraska

6111 Southfront Rd., Suite R, Livermore, CA 94551
(925) 960-1295 (925) 960-1297 Fax (925) 960-1285 (800) 333-4388

Oregon/Washington/Idaho

2233 N. Lombard, Portland, OR 97217-5737
(503) 285-0529 Fax (503) 283-4801 (800) 333-4388

March 22, 2018

Employment Training Panel
San Diego Field Office
5353 Mission Center Road
San Diego, CA 92108-1350

Re: Application to Employment Training Panel for Orora Packaging Solutions

Dear Ms. Torres:

The Teamsters District Council 2, Local 388M represents employees at Orora Packaging Solutions manufacturing operation in California. Our union supports the training of the workforce as it improves upon the skills of the workers we represent. Therefore, Teamsters District Council 2, Local 388M supports Orora Packaging Solutions application for funding from the Employment Training Panel.

Best regards,

Fernando Aguilera
General Representative

FA:sc





TEAMSTERS

LOCAL UNION NO. 63

Freight, Parcel,
Bakery, Dairy,
Meat, Poultry
and Factory
Workers in the
Los Angeles
Metropolitan
Area.

General Truck
Drivers,
Warehousemen
and Helpers in
Los Angeles,
San Bernardino,
Riverside
Counties,
California.

Agricultural and
Related Product
Workers in the
California
Counties of San
Diego, Imperial,
Orange,
Alameda,
Los Angeles,
San Bernardino,
Ventura, Santa
Barbara, Kern,
San Luis
Obispo, Tulare,
Kings,
Monterey, San
Benito, Fresno
and Merced.

927 Village Oaks
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91724
(626) 859-4005
FAX
(626) 859-4084

.....
379 W. Valley
Blvd.
Rialto, Calif.
92376
(909) 877-4760
FAX
(909) 877-2452

April 23, 2018

Employment Training Panel
San Diego Field Office
5353 Mission Center Road
San Diego, CA 92108-1350

Re: Application to Employment Training Panel for Orora Packaging
Solutions

Dear Ms. Torres:

Teamsters Local 63 represents employees at Orora Packaging Solutions manufacturing operation in California. Our union supports the training of the workforce as it improves upon the skills of the workers we represent. Therefore, Teamsters Local 63 supports Orora Packaging Solutions' application for funding from the Employment Training Panel.

Best regards,

Ruben Enriquez
Business Representative
Teamsters Local 63

RE/lis



Training Proposal for:
Stremicks Heritage Foods, LLC
Agreement Number: ET18-0234

Panel Meeting of: May 24, 2018

ETP Regional Office: San Diego

Analyst: J. Davey

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee	Industry Sector(s):	Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Orange, Riverside	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Teamsters Local No. 166; Local No. 952; Operating Engineers Local No. 501		
Number of Employees in:	CA: 287	U.S.: 1,042	Worldwide: 1,042
<u>Turnover Rate:</u>	10%		
<u>Managers/Supervisors:</u> (% of total trainees)	6%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$136,800		\$0	\$0		\$136,800

In-Kind Contribution:	100% of Total ETP Funding Required	\$153,140
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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	PL-Mfg. Skills	80	80-200	0	\$1,710	\$16.70
				Weighted Avg: 95			

Minimum Wage by County: \$17.50/hr. per hour in Orange County and \$16.70 per hour for Riverside County

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

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Batch Operator		16
Maintenance Mechanic		9
Manager/Supervisor		5
Packaging Operator		12
Pasteurizer		12
Quality Control/Filler Operator		26

INTRODUCTION

Headquartered in Santa Ana and founded in 1916, Stremicks Heritage Foods, LLC (Stremicks) owns and operates three state of the art dairy/juice mixing and bottling facilities in Santa Ana, Riverside and Ontario. The Company produces high quality beverages including organic milk, juice and nectar, teas, soy milk, rice milk, almond milk, coconut water, coffee creamer, whipping cream and half and half. These products are made under its own brands and for private labels.

PROJECT DETAILS

This is Stremicks second ETP Agreement, and the second in five years. Prior training focused on the skills needed to operate Stremicks' newly-installed, state-of-the-art batching (mixing), filling, and packing machinery installed at the Riverside facility. (The new equipment was unavailable at the Santa Ana facility; therefore, some Santa Ana employees traveled to Riverside for initial training on the new equipment.)

Stremicks' is now adding the same new state-of-the-art batching (mixing), filling, and packing machinery to its Santa Ana facility, which will require training 80 incumbent workers in the same skills to operate this new equipment. The new equipment, which costs approximately \$25 million, will be installed in early June through early July of this year. This custom-designed equipment requires extensive training to meet stringent state and federal food quality requirements, as well as new production needs as the Company increases its customer base.

Because the equipment won't be fully operational until later this summer, selected trainees will begin training at the Riverside facility to become trainers for trainees at the Santa Ana facility. In addition, some Riverside plant trainees will also participate in training, due to anticipated hiring at that facility during the term of the contract. As such, trainees from both the Santa Ana and Riverside plants will participate in training.

Training Plan

Training will be provided via Productive Lab (PL) in the following:

PL-Manufacturing Skills: Training will be offered to all occupations in operating new and existing equipment. Training will be entirely hands-on, PL training in batching (mixing), pasteurizing, filling, packaging/palletizing equipment, and other related machines and equipment. Each trainee will receive an average 95 hours of PL training.

Trainees may produce goods for profit as part of the training, in the courses identified under the Curriculum and with a trainer-to-trainee ratio of 1:3. The instructor must be dedicated to training delivery during all hours of training. Trainers will be highly qualified in the equipment and skills in which they will train employees with many years of experience. Trainees will work under the direct and constant supervision of a qualified instructor.

Due to stringent state and federal food quality requirements and because the equipment was designed and customized specifically for Stremicks, Productive Lab training is the only way to ensure that trainees properly mix, pasteurize, and package products to the highest industry standards.

In its prior ETP Agreement, Stremicks provided 100% PL training. Stremicks provided an average of 150 hours PL, with some trainees receiving 200 hours. Stremicks is once again requesting funding for PL manufacturing skills training exclusively for its production workers; however, the number of hours requested for 80 trainees (rather than 55 in the previous Agreement) will be reduced to near the funding amount earned in the first project.

Union Support

Stremicks has the support letters from Operating Engineers Local #501, Teamsters Local #166, and Teamsters Local #952.

Commitment to Training

Stremicks spends approximately \$92,000 per facility annually on training including basic job skills, new employee orientation, anti-harassment, stress management, drug and alcohol abuse in the workplace, ADA requirements in the workplace, and other mandatory training.

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

➤ **Training Infrastructure**

The Company is ready to begin training upon approval. The Human Resources manager will oversee all project administration. Stremicks has a dedicated team ready to administer the project at each training facility. All training will be conducted by in-house experts.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET14-0182	Riverside, Santa Ana	9/30/13 – 9/29/15	\$179,280	\$135,017 (75%)

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

N/A

Exhibit B: Menu Curriculum

Productive Lab Hours

80-200

Trainees may receive any of the following:

MANUFACTURING SKILLS (Ratio 1:3)

- Production
- Pasteurization
- Batching
- Quality Control
- Maintenance mechanics
- Warehouse
- Driver/Yard Goat
- Management

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



TEAMSTERS, CHAUFFEURS, WAREHOUSEMEN,
INDUSTRIAL & ALLIED WORKERS OF AMERICA
LOCAL UNION No. 166

P.O. BOX 899 • 18597 VALLEY BOULEVARD • BLOOMINGTON, CA 92316-0899
Telephone: (909) 877-TEAM • Fax: (909) 877-2812



MIKE BERGEN
Secretary-Treasurer

May 7, 2018

MIKE PHARRIS
President

JASON HODGE
Vice President

ROBERT STANLEY
Recording Secretary

Employment Training Panel
9095 Rio San Diego Drive, Suite 320
San Diego, CA 92108

DON HENLEY
Trustee

Dear Panel Members:

DAN HERNANDEZ
Trustee

Teamsters Union Local 166, affiliated with the International Brotherhood of Teamsters, fully supports Stremicks Heritage Foods proactive approach in pursuing ETP-Funding for training purposes. We support the training proposal being submitted to the Employment Training Panel by Stremicks Heritage Foods.

TERESA PADILLA
Trustee

Today's competitive and demanding markets for Stremicks Heritage Foods products require modern technology, well trained employees, and thoughtful leadership. Stremicks Heritage Foods request for these training funds support these important needs for all of us to be successful.

Please feel free to contact me regarding the above letter of support at (909) 877-8326 Ext. 231.

Sincerely,

Robert M. Rios
Business Representative

CC: Mike Bergen, Secretary-Treasurer
Mike Pharris, President/Coordinator
Adrianna Franco, Stremicks Heritage Foods Human Resources Manager



LOCAL UNION NO. 952

GENERAL TRUCK DRIVERS, OFFICE, FOOD & WAREHOUSE UNION

140 S. Marks Way • Orange, CA 92868-2698 • (714) 740-6200 • FAX (714) 978-0576 • www.teamsters952.org

April 4, 2018

Patrick D. Kelly
Secretary-Treasurer and
Principal Officer

Employment Training Center
5353 Mission Center Road, Suite 110
San Diego, CA 92108-1306

Dear Panel Members,

Teamsters Local 952 which represents the Plant, Drivers and Office Members employed at the companies Santa Ana California location fully supports the training proposal being submitted to the Employment Training Panel by Stremicks Heritage Foods.

Please contact me at 714-740-6237 if you may have any questions regarding this letter.

Respectfully,

Don Brewster
Vice President & Business Representative

CC: Adrianna Franco, Stremicks Heritage Foods HR Manager



INTERNATIONAL UNION of OPERATING ENGINEERS LOCAL 501

Southern California
2405 West 3rd Street
Los Angeles, CA 90057
T: 213.385.1561 | F: 213.385.7324
Headquarters



Southern Nevada
301 Deauville Street
Las Vegas, NV 89106
T: 702.382.8452 | F: 702.386.5813

April 6, 2018

Employment Training Panel
5353 Mission Center Road, Suite 110
San Diego, CA 92108-1306

Dear Employment Training Panel:

International Union of Operating Engineers Local 501 is supportive of Stremicks Heritage Foods training proposal submitted to the Employment Training Panel and in its application for ETP-Funding for training purposes.

In today's competitive market place and with ever expanding technology, continuing education is imperative for the Engineering staff at Stremicks Heritage Foods. We understand that a well-training Engineering staff will help insure a secure future for both the Company and its employees.

We thank you for your consideration and are available if you have any questions at (213) 385-1561 extension 101.

Sincerely,

Edward J. Curly
Business Manager
IUOE Local 501

EJC/ca

Organizing is The Key to Our Union's Future
local501.org



**TRAINING PROPOSAL FOR
Waldorf Astoria Management LLC
18-0520**

Panel Meeting Date: 05/24/2018
Regional Office: San Diego Regional Office
Analyst Name: Maria Ibarra
Type of Proposal: Single Employer
Funding Source: Out-of-State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$400,938.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$466,750.00	N/A	\$65,812.00	\$644,000.00

APPLICANT PROFILE

Company Summary	Waldorf Astoria Management LLC (Waldorf Astoria) is the resort employer and management company of the La Quinta Resort & Club (La Quinta Resort). La Quinta Resort is a full-service golf resort and convention destination.
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Industry Sector(s)	Services (Other)
Priority Industry	No
No. Employees (Applicant)	State: 1,800 US: 2,700 World Wide: 157,000
Turnover Rate (Applicant)	10.00 %
Repeat Contractor	Yes
High Unemployment Area	Yes
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Training will enable the staff the skills to support process and customer service training initiatives.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	975	\$15.00	30	*\$450	8 - 200
2	Job Creation – Retrainee Initiative Program, Retrainee	35	\$20.00	40	\$800	8 - 200

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

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Waldorf Astoria is seeking ETP funding to train its workers at the La Quinta Resort. Located in La Quinta, the La Quinta Resort was founded in 1926. Its combined properties include 800 resort rooms, 9 golf courses, 21 tennis courts, 8 pickleball courts, a 23,000 square-foot spa, 41 swimming pools, 53 hot spas, 7 restaurants, and 189 spa villas. La Quinta Resort provides luxury room accommodations; resort golf courses; health and fitness centers; gourmet restaurants; boutique retail shops; and convention and conference resources to corporate businesses, tourists, and upscale worldwide leisure travelers. The La Quinta Resort property itself is owned by BRE Iconic LQR Owner, LLC (BRE); however, Waldorf Astoria is the resort employer and the ETP-eligible contract holder of the proposed Agreement.

This will be the fifth ETP Agreement at the La Quinta Resort; however, only the second within the last five years.

2. Current Training Project Details

Purpose of Training	<p>Previous training provided skills to support and maintain high-level customer service to keep pace with other high-end resorts. Training focused on improving Satisfaction and Loyalty Tracking (SALT) scores and rebuilding occupancy rates. Additionally, new corporate directives were implemented to increase sales and improve guest service, as well as implement comprehensive company-wide customer service initiatives to change the training culture and improve quality of service to continue to improve its business outlook.</p> <p>La Quinta Resort faces fierce competition within the hospitality industry. Further, this industry sector has experienced continuous growth. Waldorf Astoria's approach in addressing competition and industry change is commitment to improving La Quinta Resort's rating, and providing guests with exceptional environment and personalized attention. The Company will implement new and improve existing process improvements.</p> <p>Specifically, Waldorf Astoria has partnered with Forbes Hospitality Solutions (Forbes) to conduct in-depth assessment to be utilized in developing training tools to achieve the Company's business goal for a consistent, exceptional guest experience.</p> <p>Training will focus on providing staff the necessary service improvement training identified by the assessment, allowing the Company to improve the quality of service and achieve higher rating scores. Training is also driven by the Company's plan to: integrate Front Desk and Housekeeping areas through implementation of a new software system to streamline guest check-in or registration process with room arrival; and implement leadership training program to provide higher level of management skills to its leadership team.</p> <p>ETP funding will help the Company to implement service-focused training programs to improve technology and customer experience, support growth within the industry, and remain viable in the marketplace.</p>
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PROPOSED TRAINING PROJECT DETAILS

Training Infrastructure and Administrative Plan	Waldorf Astoria plans to contract with an administrative subcontractor to assist with ETP project administration. The Director of Training and Human Resources Coordinator will manage the ETP project. These individuals will oversee the project, overall administration and implementation of training, scheduling, delivery, and documentation of training. They will provide copy of completed attendance rosters to the administrative subcontractor for uploading in ETP's Online System. Training will be delivered by in-house experts and vendors as needed.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	This is Waldorf Astoria's second ETP Agreement since assuming management of the La Quinta Resort in May 2017. As such, Waldorf Astoria is a repeat contractor with payment earned in excess of \$250,000 at the same location within the last five years. Accordingly, reimbursement for trainees in Group Number 1 will be reduced by 15% to reflect the Company's \$65,812 Substantial Contribution to the cost of training.

3. Curriculum Summary

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

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

4. Additional Company or Training Project Details

Retrainee - Job Creation

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

To support continuous growth, La Quinta Resort is expanding its existing business operations. Respectively, Waldorf Astoria is committed to hiring approximately 35 net new employees from all service areas of the Resort (Group Number 2). The date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract. Substantial Contribution requirement is not applicable for Job Creation (Group Number 2.)

PROPOSED TRAINING PROJECT DETAILS

Temporary to Permanent Hiring

Waldorf Astoria intends to train approximately ten workers (Group Number 2) under Panel guidelines for the Temporary-to-Permanent program. The Company has retained these employees on a temporary basis, with the intention of hiring them into full-time, permanent positions after 90 days. These temporary workers will not be eligible to receive benefits until they become full-time permanent workers.

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 Waldorf Astoria into full-time, permanent employment. Until they are so hired, retention and post-retention wage requirements cannot be satisfied and the Company will not receive progress payments.

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

Waldorf Astoria has retained the services of the following Subcontractor.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	National Training Company, Inc.	Irvine	\$15,000.00
Administrative	National Training Company, Inc.	Irvine	13.00% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

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

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
ET16-0212	La Quinta	11/6/15 – 11/5/17	\$425,575	\$425,575 (incumbent earnings \$383,905)	100%*

PROPOSED TRAINING PROJECT DETAILS

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
Notes	*ET16-0212: The final invoice closeout is currently being processed by ETP. To date, 37,757 eligible training hours have been documented in ETP Systems, for 1,167 trainees equal to \$425,575 (100% of the Agreement amount) payment earned (in process).				

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Accountability and Taking Responsibility
	Accounting Skills
	Advanced Telephone Techniques
	Client Data Procedures
	Communication Skills
	Customer Service Skills
	Dealing with Difficult Customers
	Empowerment
	Guest Service Skills
	Hospitality and Communication Skills
	Job Specific Processes
	Luxury Service Skills
	Meeting Customer Expectations
	Motivation and Attitude Improvement
	Negotiating Skills
	Point of Sale Skills
	Privacy of Customer Data Procedures
	Proactive Customer Support
	Product Knowledge
	Putting the Guest First
	Room Standards Techniques
	Sales Skills
	Service Standards
Sharecare	
Up Selling and Closing Techniques	
Up Selling your Customer	
Commercial Skills (Standard)	Advanced Golf Courses Procedures
	Facilities Maintenance Procedures
	Golf Course Irrigation Skills
	Golf Course Repair Procedures
	Maintenance Equipment Operation
	Waldorf Astoria Facilities Procedures
Computer Skills (Standard)	Customer Information Systems
	Delphi Event and Catering Tracking
	Food Management Systems Software Skills
	Improving Customer Systems
	Internal Customer Applications
	Internet Marketing
	Inventory Software Skills
	Micros Point of Sale

Attachment 2 - Training Delivery and Curriculum Listing

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

	MS Office (Advanced)
	MS Office (Intermediate)
	Outlook (Advanced)
	Outlook (Intermediate)
	PGF Tournament Software
	Reservation Systems
	Sales Reports & Schedule Software
	SharePoint Application Skills
	Smartphone Technology and Application Skills
	Tablet Technology and Application Skills
	Wi-Fi Calibration
Continuous Improvement Skills	Advanced Critical Thinking Skills
	Best Work Practices
	Critical Thinking Skills
	Exceeding Guest Expectations
	Forbes Training
	How to Retain Customers
	Luxury Travel Expectations
	Personalizing the Guest Experience
	Professionalism
	Providing Luxury Accommodations
	Relationship Building
	Resolving Service Problems
	Standard Operating Procedures
	Time Management Skills
	Tournament Procedures



RETRAINEE - JOB CREATION

Training Proposal for:

Bell Brother's Heating and Air, Inc.

Agreement Number: ET18-0211

Panel Meeting of: May 24, 2018

ETP Regional Office: Sacramento

Analyst: K. Mam

PROJECT PROFILE

Contract Attributes:	Priority Rate HUA Job Creation Initiative Veterans Retrainee	Industry Sector(s):	Construction Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Sacramento, Stanislaus	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: 220	U.S.: 220	Worldwide: 220
<u>Turnover Rate:</u>	18%		
<u>Managers/Supervisors:</u> (% of total trainees)	8%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$672,000		\$17,820 (15% Job 2)	\$0		\$654,180

In-Kind Contribution:	100% of Total ETP Funding Required	\$811,000
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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, Cont. Imp., Computer Skills, Mgmt. Skills, HazMat., OSHA 10/30, PL-Comm'l. Skills	75	8-200	0	\$2,160	\$16.80
				Weighted Avg: 120			
2	Retrainee Priority Rate	Business Skills, Comm'l. Skills, Cont. Imp., Computer Skills, Mgmt. Skills, HazMat., OSHA 10/30, PL-Comm'l. Skills	55	8-200	0	\$1,836	\$16.80**
				Weighted Avg: 120			
3	Retrainee Priority Rate HUA	Business Skills, Comm'l. Skills, Cont. Imp., Computer Skills, Mgmt. Skills, HazMat., OSHA 10/30, PL-Comm'l. Skills	90	8-200	0	\$2,160	\$12.53*
				Weighted Avg: 120			
4	Retrainee Priority Rate Job Creation Initiative	Business Skills, Comm'l. Skills, Cont. Imp., Computer Skills, Mgmt. Skills, HazMat., OSHA 10/30, PL-Comm'l. Skills	45	8-200	0	\$3,200	\$13.66*
				Weighted Avg: 160			
5	Retrainee Priority Rate Veterans Job Creation Initiative	Business Skills, Comm'l. Skills, Cont. Imp., Computer Skills, Mgmt. Skills, HazMat., OSHA 10/30, PL-Comm'l. Skills	15	8-200	0	\$3,520	\$13.66*
				Weighted Avg: 160			

*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.

** Reflects 15% Substantial Contribution

Minimum Wage by County: Job Numbers 1 & 2: \$16.80 for Sacramento County
 Job Number 3 (HUA): \$12.53 for Stanislaus County
 Job Number 4 (Job Creation): \$14.00 for Sacramento County and \$13.66 for Stanislaus County
Job Number 5 (Job Creation/Veterans): \$14.00 for Sacramento County and \$13.66 for Stanislaus County

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

Used to meet the Post-Retention Wage?: Yes No Maybe
 Up to \$2.30 per hour may be used to meet the Post-Retention Wage for Job Numbers 1 and 2;
 Up to \$1.53 per hour Job Number 3; Up to \$2.00 per hour for Job Numbers 4 and 5.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Technician		51
Administrative Staff		3
Sales Staff		4
Installation/Delivery Staff		12
Supervisor		5
Job Number 2		
Technician		35
Administrative Staff		2
Sales Staff		2
Installation/Delivery Staff		8
Supervisor		8
Job Number 3 (HUA)		
Technician		65
Administrative Staff		4
Sales Staff		6
Installation/Delivery Staff		10
Supervisor		5
Job Number 4 (Job Creation)		
Technician		30
Administrative Staff		2
Sales Staff		3
Installation/Delivery Staff		7
Supervisor		3

Job Number 5 (Veterans)		
Technician		10
Sales Staff		2
Installation/Delivery Staff		2
Supervisor		1

INTRODUCTION

Founded in 1991 and headquartered in Mather, Bell Brother's Heating and Air, Inc. (Bell Brother's) provides heating, ventilation, air conditioning (HVAC), plumbing installation, and repair, diagnostic services to residential homeowners or tenants. Training will be delivered at the Company's three locations in Sacramento and Stanislaus counties.

PROJECT DETAILS

California Code of Regulations, Title 24, Part 6, California Building Standards Code, also titled The Energy Efficiency Standards for Residential and Nonresidential Buildings, was created by the California Building Standards Commission in 1978 to reduce California energy consumption. The standards are updated periodically by the California Energy Commission to allow consideration and possible incorporation of new energy efficiency technologies and methods. Training under this proposal will allow the Company to extend its training plan to incorporate the CA Title 24 mandated changes.

Need For Training

This is Bell Brother's third ETP Agreement, and the third in the last five years. The Company will continue training to adapt to ongoing changes to Title 24 regulations and guidelines. Although training topics are similar to those provided in the prior Agreement, trainees will not repeat the same training courses previously received.

Trainees must to be properly trained in inverter technology, home performance/efficiency, smart systems, nano-technology, radiant barriers, solar technology and air quality mandates; along with the tools, processes and diagnostics necessary to facilitate integration of these technological changes.

Additionally, Bell Brother's has expanded its services to include glass and solar systems. The Company has invested over \$180K on new solar panel test equipment and tools. Staff needs to be trained on new technology and systems.

Furthermore, the Company has recently implemented a training program for Technicians on full service HVAC, plumbing and electrical maintenance. Training will focus on cross-training workers to expand and upgrade their maintenance skillsets. This program will allow the Company to reduce cost and ensure better whole home efficiency for consumers by maintaining quality and customer service.

Green/Clean

Bell Brother's is involved in Green, Clean technology with several recent changes to California Title 24 which requires substantial increases in heat and cooling efficiency along with air quality and ventilation systems. Bell Brother's services and installs systems known as "Nano air" that uses nanotechnology to eliminate the use of common refrigerants such as CFC/HCFC. This

technology harnesses Nano particles and doesn't use cooling agents like fluorocarbons, thus cutting the carbon footprint by 50%, and toxic CO2 emissions are reduced by 57%.

Retrainee - Job Creation

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

Bell Brother's has expanded its service area to include Fresno. In order to support the expansion and new equipment, the Company has committed to hiring 60 new employees (Job Numbers 4 and 5). The Company will hire Technicians, Supervisors, Administrative, Sales and Installation/Delivery Staff. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract. The Substantial Contribution requirement is waived for Job Creation (Job Numbers 4 and 5).

Training Plan

Training will be delivered via Classroom/Laboratory and Productive Lab methods in the following:

Business Skills: Training will be offered to all occupations and focus on improving customer service skills. Training topics include Negotiation Skills, Understanding and Managing Expectations and Communication Skills.

Commercial Skills: Training will be offered to all occupations. Training will focus on adhering to Title 24 requirements and new technologies. Topics include Thermal Dynamics, Fundamentals of Solar Technology, Title 24 Standards and Ventilation System.

Computer Skills: Training will be offered to all occupations and focus on the Company's HVAC Management Software and building codes. Training topics include Trenchless Video X-Ray and Successware (Proprietary HVAC Management Software) Skills.

Continuous Improvement: Training will be offered to all occupations. Training will focus on improving overall operational efficiency and quality control. Topics include Leadership Skills, Team Building and Logistics Efficiency.

Management Skills (5%): Training will be offered to Supervisors and focus on team building and improving communication. Training topics include Business Acumen Skills, Building High Performance Teams and Coaching for Leaders.

Hazardous Materials: Training will be offered to Technicians, Installation/Delivery Staff and Supervisors. Training will allow staff to operate in an appropriate manner when handling hazardous materials and conditions. Topics include Asbestos Procedures/Handling and Coolant Systems - Evac and Weigh In Procedures.

Certified Safety Training

OSHA 10/30 Training will be offered to Technicians, Installation/Delivery Staff and 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

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 to training delivery during all hours of training, and special attendance rosters will be used to assist in monitoring.

Bell Brother's will provide PL-Commercial Skills training for Technicians and Installation/Delivery Staff. PL training will allow the Company to train staff to extend technical learning under practical working conditions without creating an excess of waste. PL training will focus on training topics such as thermal dynamics, heat pump systems, solar panels and glass materials. The Company is requesting a trainer-to-trainee ratio of 1:2 as some training requires a "team" of two trainees.

Training will be taught by subject-matter experts with demonstrated knowledge and expertise in the field. Instructors will monitor trainee competencies before the trainee is deemed competent.

Veterans Program

The Panel has established a higher reimbursement rate and other incentives for training California veterans. Bell Brother's has identified approximately 15 Veterans to be trained in Job Number 5 who have served on active full-time duty in the Armed Forces. Veterans will receive a higher reimbursement rate of \$22 per hour. The Company actively works with organizations and job placement firms that seek to match veterans with its employment opportunities. The Company also participates in veteran-focused job fairs and online recruiting events.

Substantial Contribution

Bell Brother's is a repeat contractor with payment earned in excess of \$250,000 at the Mather facility within the past five years. Accordingly, reimbursement for trainees at the Mather facility (Job Number 2) will be reduced by 15% to reflect the Company's \$17,820 Substantial Contribution to the cost of training.

Commitment to Training

ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law. The Company invests over \$300,000 per facility annually for training that includes basic safety, company orientatin and departmental on-the-job training.

➤ Training Infrastructure

Bell Brother's has a detailed plan to facilitate and administer training. The Company has assigned its HR Director, two support staff, and five trainers to oversee all training efforts and to ensure recordkeeping requirements are met. Additionally, the Company has retained a third-party administrator with extensive ETP administration experience to work closely with staff to complete the project successfully.

Training will be delivered by in-house experts and vendors as needed.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by Bell Brother's under ETP Agreements that were completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0177	Sacramento, Stanislaus	10/05/15 – 10/04/17	\$560,000	\$495,459 (89%)
ET15-0195	Sacramento, Stanislaus	07/01/14 – 06/30/16	\$154,584	\$154,584 (100%)

DEVELOPMENT SERVICES

Synergy Management Consultants, LLC in Grass Valley assisted with the development for a flat fee of \$32,154.

ADMINISTRATIVE SERVICES

Synergy Management Consultants, LLC 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

- + Active Listening Skills
- + Communication Skills
- + Conflict Resolution
- + Connecting With Clients
- + Customer Needs Assessment
- + Develop Emotional Quotient to Match Your IQ
- + Negotiation Skills
- + Personality Traits and Skills Builder Applications
- + Persuasion Strategies
- + Presentation Skills
- + Understanding and Managing Expectations

COMMERCIAL SKILLS

- + HVAC
 - o Advanced A/C Systems
 - o Advanced Diagnosis
 - o Advanced Wiring and Schematics
 - o Air Quality Diagnostics and Methodologies
 - o Barrier Methodologies
 - o Connected Home Technology
 - o Digital Tools
 - o Digital Tools Gauges
 - o Field/Tool Gauges
 - o Fundamentals of Air Conditioning Systems
 - o Fundamentals of HVAC
 - o Fundamentals of Solar Technology
 - o Heat Pump Systems
 - o Insulating Methodologies
 - o Inverter Technology
 - o Inverter Type Motors
 - o Maintenance Tune Up Procedures
 - o Metering Devices
 - o Motors
 - o Switches and Electrical Components
 - o System Controls/Smart System Controllers
 - o System Sizing
 - o Thermal Dynamics
 - o Thermostats
 - o Ventilation Systems
- + Plumbing
 - o Back Flow Systems
 - o Basic Tools
 - o Compression Fittings
 - o Diagnostics
 - o Disposals
 - o Drains

- Drawings/Plans
- Fixtures and Faucets
- Fundamentals of Water Flow and Plumbing Systems
- Gas and Fuel Systems
- Maintenance of Fixtures Drains and Water Heaters
- On Demand Hot Water Systems
- Pipes and Fittings
- Pipes and Supply Lines
- Plumbing Code
- Plumbing for Mobile Homes
- Septic Systems Maintenance
- Sewage and Pump Systems
- Specialized Tools
- Trenchless Systems and Tooling
- Valves
- Venting
- Video Inspection
- Water Heaters
- Water Pressure Booster and Recirc Systems
- Water Supply Treatment Systems
- ✚ Electrical
 - Electrical Components and Devices
 - Electrical Fundamentals
 - Electrical Safety and Tools
 - Reading Electrical Drawings, Fixture Schematics
- ✚ Lighting
 - High/Low Voltage Systems
 - Residential Electrical Systems
 - Troubleshooting Electrical Systems/Components
 - Wiring – Conduits, Cables and Connectors
- ✚ Glass
 - Building Design
 - Cutting and Handling Glass
 - Cutting Tools
 - Diagnostics/Measuring
 - Encapsulated Glass Procedures
 - Glass Layout
 - Glass Materials
 - Metal Sash
 - Mirrors, Shower Doors, Tub Enclosures
 - Remodel Replacement
 - Residential Glass Code
 - Safety Glass Procedures
 - Sealants
- ✚ Title 24 Standards

COMPUTER SKILLS

- ✚ Make Technology Your Asset
- ✚ Regulatory Code Research Techniques
- ✚ Successware (Proprietary HVAC Management Software) Skills
- ✚ Tablet Applications
- ✚ Trenchless Video X-Ray
- ✚ Water Leak Video Inspection Tools

CONTINUOUS IMPROVEMENT

- + Kaizen Event Strategy and Implementation
- + Leadership Skills
- + Lean Production
- + Logistics Efficiency
- + Quality Control/Systems
- + Root Cause Analysis
- + Team Building

MANAGEMENT SKILLS (Supervisors Only)

- + Building High Performance Teams
- + Business Acumen Skills
- + Coaching for Leaders
- + Motivating Employees

HAZARDOUS MATERIALS

- + Asbestos Procedures/Handling
- + Coolant Systems – Evac and Weigh In Procedures
- + EPA Licensing
- + HAZMAT Safety

OSHA 10/30 (OSHA Certified Instructor)

- + OSHA 10 (requires 10 hours completion)
- + OSHA 30 (requires 30 hours completion)

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

Productive Lab Hours

0-60

COMMERCIAL SKILLS (Ratio 1:2)

- + HVAC
 - o Air Conditioning Systems
 - o Air Quality Diagnostics and Methodologies
 - o Barrier Methodologies
 - o Diagnostics
 - o Digital Tools
 - o Heat Pump Systems
 - o HVAC Maintenance Service
 - o Insulation
 - o Inverter Type Systems
 - o Metering Devices
 - o Motors
 - o Switches and Electrical Components
 - o System Controls/Smart System Controllers
 - o Thermal Dynamics
 - o Thermostats
 - o Tune Up Procedures
 - o Ventilation Systems
 - o Whole Home Fans
 - o Wiring

- ✚ Plumbing
 - Back Flow Systems
 - Cast Iron Pipe and Fittings
 - Copper Pipe and Fittings
 - Corrugated Stainless Steel Tubing
 - Disposals
 - Drains/Roof/Floor Area
 - Drawing/Plans
 - Fixtures and Faucets
 - Gas and Fuel Systems
 - Locating Buried Water and Sewer Lines
 - On Demand Hot Water Systems
 - Pipes and Fittings
 - Pipes and Supply Lines
 - Plumbing for Mobile Home
 - Plumbing Maintenance Tasks
 - Septic Systems
 - Sewage and Pump Systems
 - Valves
 - Venting
 - Video Inspection
 - Water Heaters
 - Water Supply Treatment Systems
- ✚ Glass
 - Cutting and Handling Glass
 - Cutting Tools
 - Diagnostics/Measuring
 - Glass Materials
 - Metal Sash
 - Mirrors, Shower Doors, Tub Enclosures
 - Remodel Replacement
 - Residential Glass Code
 - Safety Glass Procedures
 - Sealants
- ✚ Electrical
 - Electrical Issues
 - High and Low Voltage Fixtures
 - Panels, Sub-Panels
 - Wiring, Conduits, Connectors

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:

**Joint Apprenticeship Committee for Operating Engineers for
the 46 Northern Counties in California**

Agreement Number: ET18-0922

Panel Meeting of: May 24, 2018

ETP Regional Office: Sacramento

Analyst: K. Jones

PROJECT PROFILE

Contract Attributes:	Retrainee Apprenticeship Priority Rate	Industry Sector(s):	Construction Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Northern California	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Operating Engineers Local No. 3		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
\$886,640		\$61,560 8%		\$948,200

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

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate Apprentice	Commercial Skills, OSHA 10/30	295	8-210	0	\$2,002	\$22.77
				Weighted Avg: 144			
2	Retrainee Priority Rate Pre-Apprentice	Commercial Skills, OSHA 10	80	8-200	0	\$3,882	\$22.77
				Weighted Avg: 165			
3	Retrainee Priority Rate Journeymen	Commercial Skills, OSHA 10/30	25	8-200	0	\$1,882	\$22.77
				Weighted Avg: 80			

Minimum Wage by County: \$22.77 per hour Statewide (Priority Industry)
Health Benefits: Yes No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: Yes No Maybe
 Up to \$0.62 per hour may be used to meet the Post-Retention Wage for Job Number 2.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Apprentice: Construction Equipment Operator, Mobile/Vertical/Horizontal Drilling Machine Operator, Plant Operator, Grade Checker, Mobile Concrete Pump Operator, Dredge Operator, Heavy Duty Repairer, Construction Lubrication Technician and Crane Operator		295
Job Number 2		
Pre-Apprentice: Operating Engineer		80
Job Number 3		
Journeymen: Operating Engineer		25

INTRODUCTION

Joint Apprenticeship Committee for Operating Engineers for the 46 Northern Counties in California (Operating Engineers JAC) (www.oe3.org) is a joint labor management organization founded in 1969 to provide high-quality and up-to-date training in cranes, blades, dozers, track loaders, backhoes, excavators and forklifts for apprentice, pre-apprentice and journey level operators. Apprentices work on a variety of infrastructure-related construction projects including roadways, dams, and bridges.

Currently, the main training center, located in Sloughouse, consists of an eleven acre campus and serves 48 counties. An additional 80 acres are devoted to a training yard and maintenance area where hands-on training is conducted in a simulated lab environment. The Operating Engineers JAC currently represents over 693 apprentices in Northern California.

This is the third ETP Agreement with Operating Engineers in the last five years.

Funding Cap

The Panel capped funding for Apprentice training at \$450,000 per program sponsor in FY 2016/17, with case-by-case flexibility. This cap does not apply to Pre-Apprentice and Journeyman training.

Operating Engineers JAC provides training to Journeymen, Pre-Apprentice and Apprentice Operating Engineers working in 48 Northern California counties. Given the broad scope of this geographic region, and the 693 registered Apprentices and Journeymen to potentially be trained, a \$450,000 cap is overly restrictive in this case. Based on the current need for Apprenticeship training in Northern California, the Operating Engineers JAC is requesting \$590,590 for its Apprentice training program, and staff recommends funding Apprentice training at the full amount of \$590,590.

Employer Demand

ETP funding will allow employers to handle the growing volume of work in Northern California by providing workers with skills to meet demand and industry changes.

New construction requiring heavy machinery and demand for long-term servicing and machinery repair continues to grow. Training will ensure employers can meet the demands of their customers. Sample construction projects in Northern California where Operating Engineers are working or will be working during the Agreement term includes: The Oroville Dam Reconstruction Project and The CA High-Speed Rail Project. The Operating Engineers JAC is also involved in clean-up efforts after the California wildfires.

The Operating Engineers JAC is also experiencing technological changes in the industry. Heavy machinery is being modernized with new controls and updated with the latest GPS technologies. Drones are being used to survey construction sites and robotics operated through remote control are being developed and utilized.

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 supplements the cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. Grade Checker, Construction Lubrication Technician, Dredge Operator, Mobile/Vertical/Horizontal Drilling Machine Operator, and Mobile Concrete Pump Operator apprenticeship programs are 27 months in length; Plant operator is 39 months; Construction Equipment Operator is 39 months; and Heavy Duty Repairer apprenticeship program is 51 months.

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.]

PROJECT DETAILS

Training Plan

All class/lab training will be delivered at the Operating Engineers JAC’s headquarters in Sloughhouse. Trainers are qualified Journeymen with extensive technical expertise and training experience, employed by the Operating Engineers JAC. All instructors meet standards set by the LEA.

Commercial Skills: Training will educate Apprentices, Pre-Apprentices and Journeymen trainees on heavy equipment standards and efficiencies. Course topics will include Operating and Set-up of Heavy Equipment, Management and Monitoring of Heavy Equipment, Forklift Operation and Understanding Changes to Industry Standards.

Certified Safety Training

OSHA 10/30: Journeymen, Pre-Apprentices and Apprentices may receive OSHA 10/30. This training is a series of courses “bundled” by industry sector and occupation. Completion of the training results in a certificate that expands employment opportunities. Typically, OSHA training is delivered to workers in the building trades. This training is not required as a condition of doing business in California. Note: To ensure that each trainee receives certification, ETP will only consider payment earned upon completion of the full course. OSHA 10/30 is not included in the 10% limitation on safety training. The trainer-to-trainee ratio is 1:40 for OSHA 10/30.

Curriculum Development

Employers submit program-training needs to the training center, which also receives additional union input at labor/management and industry meetings. Curriculum development is further customized for local area employers. Employer members of the Operating Engineers JAC are also involved in Journeyman and Apprentice training plan design. Apprentice training will include RSI under the curriculum approved by DAS, along with ancillary training in demand by signatory employers. The trainers are former or current journey level members of the trade and experts in the subject matter.

Commitment to Training

ETP funding will not displace the Operating Engineers JAC’s financial commitment to training. Signatory employers will continue to make contributions to the training trust for every hour worked by Apprentices and Journeymen. General safety training is provided by participating employers in accordance with all pertinent requirements under state and federal law.

➤ **Training Infrastructure**

The Executive Secretary and Training Coordinator, who were involved in previous ETP training Agreements, will assist with administration. The staff will coordinate training, enroll trainees and track training hours in the ETP online systems. Training attendance rosters will be kept by each instructor and passed to Operating Engineers JAC staff to be uploaded to the online sites.

Marketing and Support Costs

Marketing is done through the JAC's website, direct mailings, brochures/flyers, personal contacts, telephone calls, public service announcements and e-mail announcements. Operating Engineers JAC also promote this training program at labor-management meetings and industry assemblies.

Operating Engineers JAC requests 8% support costs to fund its staff in recruiting and qualifying additional participating employers for this program. While many participating employers have already been recruited, additional recruitment and assessment activities with employers and the Operating Engineers JAC must occur to support apprenticeship training. Staff recommends 8% support costs.

PRIOR PROJECTS

The following table summarizes performance by Operating Engineers JAC under previous ETP Agreements that were completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0915	Sloughhouse	11/16/2015– 11/15/2017	\$948,894	\$948,894 (100%)
ET13-0920	Sloughhouse	01/01/2013– 12/31/2014	\$716,531	\$716,531 (100%)

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**

8-210

Trainees may receive any of the following:

Apprentice Training**COMMERCIAL SKILLS**

- Backhoe
 - Blade
 - Dozer
 - Excavator
 - Grade Setting
 - Global Positioning System (GPS)
 - Loader
 - Scraper
 - Support Equipment
 - Paving
 - Compactor
 - GPS for Grade Setting
 - Forklift
 - Rigging
 - Signalman
 - Electrical
 - Hydraulic
 - Engines
 - Power
 - Welding
 - Lube Technician
 - Air Conditioning (A/C)
 - Advanced Electronics
 - Air Brakes
 - Forklift
 - Rigging
 - Signalman
 - Rigging
 - Signalman
 - Load Charts
 - Cleaning & Lubrication
 - Boom Sections
 - Crane Operations
 -
- OSHA 10/30 (OSHA CERTIFIED INSTRUCTOR)**
- OSHA 10/30

Class/Lab Hours

8-200

Trainees may receive any of the following:

Journeyman Training**COMMERCIAL SKILLS**

- Operating and Set-Up of Heavy Equipment
- GPS for Grade Setting
- Heavy Duty Repair
- Introduction to Cranes
- Load Charts
- Crane Operations
- Forklift Operation
- Hazardous Materials Training
- Management and Monitoring of Heavy Equipment
- Understanding Changes to Industry Standards
- Forklift Operation
- Commercial Driver's License
- Job Site Safety
- Rigging
- Signalman

OSHA 10/30 (OSHA CERTIFIED INSTRUCTOR)

- OSHA 10/30

Pre-Apprentice Training**COMMERCIAL SKILLS**

- Introduction to Grade Setting/Checking
- Underground Support Equipment
- Forklift
- Grading Support Equipment
- Introduction to Drilling
- Introduction to Earth Moving Equipment
- Introduction to Excavating Equipment
- Introduction to Paving
- Flagging
- Construction Site Traffic Control
- Construction Safety
- Job Site Orientation
- Rigging
- Signalman
- Introduction to Heavy Equipment Repair
- Field Service and Lube
- Introduction to Electrical-Hydraulics
- Introduction to Engines
- Introduction to Welding
- Commercial Driver's License
- Flagging

- Construction Safety
- Job Site Orientation
- Rigging
- Signalman
- Introduction to Crane Operations
- Rigging
- Signalman
- Forklift Operation
- Crane Assembly
- Load Charts
- Commercial Driver's License
- Flagging
- Construction Safety
- Job Site Orientation

OSHA 10 (OSHA Certified Instructor)

- OSHA 10

Note: Reimbursement for retraining is capped at 200 total training hours for Pre-Apprentices and Journeymen per trainee; and 210 total training hours for Apprentices, regardless of the method of delivery.



**Amendment Proposal #1 for:
Greater San Fernando Chamber of Commerce
Agreement Number: ET18-0136**

Amendment Effective Date: May 25, 2018

Panel Meeting of: May 24, 2018

ETP Regional Office: North Hollywood

Analyst: L. Vuong

CURRENT PROJECT PROFILE

<p>Contract Type: Priority/Retrainee Priority/SB<100 SET/HUA - Retrainee</p> <p>Counties Served: Los Angeles, Orange, Ventura, Santa Barbara, San Bernardino</p> <p>Union(s): <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>	<p>Industry Sector(s): Manufacturing Construction Engineering</p> <p>Repeat Contractor: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p>
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Current Contract Term: October 30, 2017 to
October 29, 2019

Current Funding	In-Kind Contribution
\$187,176	\$99,240

AMENDMENT FUNDING

Requested Funding	Support Costs	Amendment Funding	In-Kind Contribution
\$157,140	\$10,802	\$167,942	\$99,240

Total Funding
\$355,118

AMENDMENT TRAINING PLAN TABLE

Job No.	Job Description (By Contract Type)	Type of Training	Estimate d No. of Trainees	Range of Hours		Average Cost per Trainee	Post- Retentio n Wage
				Class / Lab	CB T		
1	Priority/Retrainee	Business Skills, Computer Skills, Continuous Impr.	116	8-200	0	\$577	\$16.16
				Weighted Avg: 30			
2	Priority/Retrainee SB<100	Business Skills, Computer Skills, Continuous Impr.	116	8-200	0	\$834	\$16.16
				Weighted Avg: 30			
3	Retrainee SB<100	Business Skills, Computer Skills, Continuous Impr.	25	8-200	0	\$470	\$16.16
				Weighted Avg: 20			
4	Retrainee SB<100 SET HUA	Business Skills, Computer Skills, Continuous Impr.	25	8-200	0	\$470	*\$12.72
				Weighted Avg: 20			
5	Priority/Retrainee	Business Skills, Computer Skills, Continuous Impr.	180	8-200	0	\$577	\$16.16
				Weighted Avg: 30			
6	Retrainee	Business Skills, Computer Skills, Continuous Impr.	50	8-200	0	\$481	\$16.16
				Weighted Avg: 30			
7	Priority/Retrainee SB<100	Business Skills, Computer Skills, Continuous Impr.	48	8-200	0	\$834	\$16.16
				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 statewide minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table.

Minimum Wage by County: Job Numbers 1-3: \$16.96 per hour for Los Angeles County; \$17.22 per hour for Orange County; and \$16.16 per hour for Ventura County. Job Number 4 (SET/HUA Wage): \$12.72 per hour for Los Angeles County.

Phase II: Job Numbers 5, 6, and 7: \$16.96 per hour for Los Angeles County; \$17.22 per hour for Orange County; and \$16.16 per hour for Ventura, Santa Barbara and San Bernardino Counties.

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

Used to meet the Post-Retention Wage?: Yes No Maybe
Participating employers may use health benefits to meet the Post-Retention Wage. Health benefits will vary by participating employer.

Wage Range by Occupation	
Occupation Title	Wage Range
Job Numbers 1-7	
Administration Staff	
Operator	

Production Worker	
Engineer I	
Engineer II	
Manager/Supervisor I	
Manager/Supervisor II	
Shop Lead I	
Shop Lead II	
Customer Service Staff	
Small Business Owner (Jobs 2, 4, and 7)	

INTRODUCTION

Founded in 1911 and located in Van Nuys, the Greater San Fernando Valley Chamber of Commerce (Greater San Fernando Chamber) (www.sanfernandovalleychamber.com) is a nonprofit membership organization whose mission is to create and foster a sustainable business environment in the San Fernando Valley region through networking opportunities, advocacy, promotion and community projects. Greater San Fernando Chamber partners with other chambers within Los Angeles County, including Valley Industry & Commerce Association and The Valley Economic Alliance. These partnerships help identify the needs of manufacturers and connect employers to the tools needed to help them become more successful. Many of these companies need training to upgrade the skills of their workforce and to help them grow and stay competitive in California.

AMENDMENT DETAILS

Phase II

Phase II funds will accommodate employees of newly recruited participating employers. These employers had requested ETP-funded training; however, all funds in Phase I are already committed. Phase II funds will train an additional 278 incumbent workers in new Job Numbers 5, 6 and 7. This will increase the estimated number of trainees from 282 to 560 and the Agreement amount from \$187,176 to \$355,118. Employers from Santa Barbara and San Bernardino Counties will also be served.

As a new program participant, Greater San Fernando Chamber's initial proposal was funded conservatively. The Chamber has already provided a significant amount of training detailed in the initial proposal and anticipates 100% performance based on training committed to by employers. Greater San Fernando Chamber has already entered 81% of eligible hours into ETP Online Tracking.

Trainees are going through an aggressive training plan, including multi-day and multi-week classes. With 14 months of training remaining in the contract term, Greater San Fernando Chamber is confident it will utilize all requested funding. There will be no changes to curriculum or trainee wages.

Greater San Fernando Chamber has submitted new certification statements from participating employers, which represents 100% of requested funds in Phase II. Phase II training will be prospective only, to begin after Panel approval.

RECOMMENDATION

Staff recommends approval of this Amendment.

CURRENT CONTRACT PERFORMANCE

The following table summarizes performance by Greater San Fernando Chamber under the current ETP Agreement(s):

Agreement No.	Approved Amount	Term	No. Trainees (Average)	No. Completed Training	No. Retained
ET18-0136	\$187,176	10/30/2017 – 10/29/2019	282	TBD	TBD

ET18-0136: As of April 16, 2018, 167 trainees have been enrolled and 157 trainees are still in training. The ETP Class/Lab Tracking System shows a total of 5,484 eligible hours for potential earnings of \$152,455 (81% of the Agreement amount). The Contractor projects final earnings of 100% based on training currently committed to by employers and in progress to the end of the training period 07/30/2019.

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

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

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

COMPUTER SKILLS

- E- Commerce
- QuickBooks and Accounting Software
- Search Engine Optimization (SEO)
- Social Media Networking Training
- Microsoft Office Suite (Word, Excel, Access, PowerPoint)

CONTINUOUS IMPROVEMENT

- ISO Auditor Training
- Quality Engineering
- Six Sigma
- Statistical Process Control Team Building
- Lean Enterprise
- Lean Manufacturing
- Lean Office
- Kaizen 7S
- Process Improvement
- Process Mapping
- Problem Solving
- Root Cause Analysis
- Set Up Time Reduction

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: Greater San Fernando Valley Chamber of Commerce CCG No.: ET18-0136

Reference No: 17-0275

Page 1 of 2

Company: American Jerky

Address: 2400 E Francis Street

City, State, Zip: Ontario, CA 91761

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 18

Total # of full-time company employees worldwide: 63

Total # of full-time company employees in California: 63

Company: Con Tech Plastics

Address: 3200 E Birch Street

City, State, Zip: Brea, CA 92821

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 18

Total # of full-time company employees worldwide: 42

Total # of full-time company employees in California: 42

Company: Fox Head Inc.

Address: 16752 Armstrong Ave

City, State, Zip: Irvine, CA 92606

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 60

Total # of full-time company employees worldwide: 500

Total # of full-time company employees in California: 300

Company: Gardner Trucking

Address: 9032 Merrill Ave.

City, State, Zip: Ontario, CA 91762

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 1200

Total # of full-time company employees in California: 3000

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Greater San Fernando Valley Chamber of Commerce CCG No.: ET18-0136

Reference No: 17-0275

Page 2 of 2

Company: Harvest Landscape Inc.

Address: 2339 N Batavia Street

City, State, Zip: Anaheim, CA 92865

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 425

Total # of full-time company employees in California: 425

Company: Optical Display Engineering

Address: 1542 Edinger Ave

City, State, Zip: Tustin, CA 92780

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 17

Total # of full-time company employees worldwide: 17

Total # of full-time company employees in California: 17



**Panel Amendment #3 Proposal for:
Intuitive Surgical, Inc.
Agreement Number: ET17-0118**

Amendment Effective Date: December 20, 2017

Panel Meeting of: May 24, 2018

ETP Regional Office: San Francisco Bay Area

Analyst: C. Hoover

CURRENT PROJECT PROFILE

Contract Type:	Priority/Retrainee Job Creation Veterans	Industry Sector(s):	Manufacturing Healthcare Technology/Other
Counties Served:	Santa Clara	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:	July 11, 2016 to July 10, 2018	Substantial Contribution:	<input checked="" type="checkbox"/> Yes 15% <input type="checkbox"/> No

CURRENT FUNDING

Current Funding
\$395,876

AMENDMENT FUNDING

Requested Funding	Total Funding
\$81,300	\$477,176

AMENDMENT TRAINING PLAN TABLE

Job No.	Job Description (By Contract Type)	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Priority Retrainee	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, PL-Mfg. Skills	300	8-200	0-28	*\$703	\$17.02
				Weighted Avg: 46			
2	Priority Retrainee Job Creation	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, PL-Mfg. Skills	100	8-200	0-28	\$2,540	\$14.19
				Weighted Avg: 127			
3	Veterans Retrainee Priority Rate	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, PL-Mfg. Skills	7	8-200	0-28	*\$748	**\$17.02
				Weighted Avg: 40			
4	Veterans Job Creation Retrainee Priority Rate	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, PL-Mfg. Skills	8	8-200	0-28	\$880	**\$14.19
				Weighted Avg: 40			

*Reflects Substantial Contribution

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

Minimum Wage by County: Job Numbers 1 & 3: \$17.02 per hour for Santa Clara County.
 Job Number 2 (Job Creation): \$14.19 per hour for Santa Clara 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 \$2.99 per hour may be used to meet the Post-Retention Wage in Job Numbers 1 & 3 and up to \$1.19 per hour in Job Numbers 2 & 4.

Wage Range by Occupation	
Occupation Title	Wage Range
Job Number 1	
Information Technology Staff	
Engineering/Quality/Research & Development Staff I	
Engineering/Quality/Research & Development Staff II	
Manufacturing/Logistics Staff I	
Manufacturing/Logistics Staff II	

Marketing/Sales Staff	
Operations Support Staff I	
Operations Support Staff II	
Technician/Service Staff	
Supervisors/Managers	
Job Number 2 (Job Creation)	
Information Technology Staff	
Engineering/Quality/Research & Development Staff	
Manufacturing/Logistics Staff	
Marketing/Sales Staff	
Operations Support Staff	
Technician/Service Staff	
Supervisors/Managers	
Job Number 3 (Veterans)	
Information Technology Staff	
Engineering/Quality/Research & Development Staff	
Manufacturing/Logistics Staff	
Marketing/Sales Staff	
Operations Support Staff	
Technician/Service Staff	
Supervisors/Managers	
Job Number 4 (Job Creation/Veterans)	
Information Technology Staff	
Engineering/Quality/Research & Development Staff	
Manufacturing/Logistics Staff	
Marketing/Sales Staff	
Operations Support Staff	
Technician/Service Staff	
Supervisors/Managers	

INTRODUCTION

Founded in 1995 and headquartered in Sunnyvale, Intuitive Surgical, Inc. (ISI) (www.intuitivesurgical.com), with its affiliate, Intuitive Surgical Operations, Inc. (ISOI) manufactures surgical robots used across cardiac, urology, gynecologic, colorectal, pediatric and general surgical disciplines. ISI is the parent company that focuses on sales/marketing, and its subsidiary, ISOI focuses on manufacturing. ETP-funded training will be delivered to both ISI and ISOI employees under this Agreement.

AMENDMENT DETAILS

During an on-site Monitoring Visit on August 10, 2017, the Company had already delivered 85% of training hours. However, due to continued growth and expanding products, ISI requests to increase the weighted average for Job Numbers 1 (from 40 to 46) and 2 (from 100 to 127) which increases the total funding amount by \$81,300. The increased training hours are required for new certifications. The Company requires employees to obtain a new certification before being allowed to manufacture a particular product. The following is a list of training that will be delivered with the additional funding:

- Single Port (3-day technical training)
- The da Vinci X System / 4th generation (3-day system training)
- Diagnostic (4-hour and 1-day system training)
- RMA (5-day and 15-day repair training)
- dVSTAT (1-day customer support call-center training)

Manufacturing/Logistics Staff, Engineering/Quality/Research & Development Staff, and Technician/Service Staff will receive the majority of the additional training hours. Job Number 1 and Job Number 3 trainees are subject to Substantial Contribution, and the amount requested reflects a 15% Substantial Contribution rate.

Retroactive Effective Date

The Company requests a retroactive effective date of December 20, 2017, the date of request. On February 26, 2018, ISI's administrative subcontractor contacted ETP about the status of this Amendment request that was entered into the ETP Online Forms system. However, ETP staff did not receive the request due to online system issues. The Company has been training in anticipation of approval of this Amendment.

RECOMMENDATION

Staff recommends approval of this Amendment.

SUMMARIZE PRIOR MODS/AMENDS

The follow is a summary of the prior Agreement Revisions:

- Revision 1- Amendment (AMD1) added E-Learning as a method of delivery.
- Revision 2- Modification (MOD2) added Computer Skills as a type of training to computer-based training (CBT) and added CBT courses to Business Skills, Computer Skills and Continuous Improvement.

CURRENT CONTRACT PERFORMANCE

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

Agreement No.	Approved Amount	Term	No. Trainees Enrolled	No. Completed Training	No. Retained
ET17-0118	\$395,876	7/11/2016 to 7/10/2018	944	924	0

The Company has uploaded 26,558 hours in ETP Online Tracking, equivalent to 100% of the approved amount.

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

8 – 200

Trainees may receive any of the following:

MANUFACTURING SKILLS

- Change Order Process Skills
- Clinical Skills
- Failure Mode Effects Analysis
- Geometric Dimensioning and Tolerancing
- Good Documentation Practices/Good Manufacturing Practices
- New/Updated Manufacturing Processes/Systems/Products
- Production/Equipment Operations and Maintenance
- Root Cause Analysis/Corrective Action
- Technician Product Certification

CONTINUOUS IMPROVEMENT

- Change Management Skills
- Coaching/Feedback
- Goal Setting
- Innovation Skills
- Leadership Skills
- Process Improvement Skills
- Project Management Skills
- Quality Assurance/Quality Control
- Six Sigma Skills
- Statistical Process Control Skills

COMPUTER SKILLS

- Agile Software Skills
- Change Order System Skills
- Computer-Aided Engineering and Design Tools
- Intermediate/Advanced Microsoft Office Skills
- ISI Proprietary Systems Skills

BUSINESS SKILLS

- Business Acumen
- Communication/Team Building Skills
- Customer Service/Support Skills
- Individuals with Disabilities
 - Accessibility
 - Disability Culture: Sensitivity, Awareness, and Hiring Practices
 - Skills Development for People with Disabilities
- Finance/Accounting Skills
- Marketing/Sales Skills
- Meeting Management

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

E-Learning Hours

0 – 50

MANUFACTURING SKILLS

- Change Order Process Skills
- Clinical Skills
- Failure Mode Effects Analysis
- Geometric Dimensioning and Tolerancing
- Good Documentation Practices/Good Manufacturing Practices
- New/Updated Manufacturing Processes/Systems/Products
- Production/Equipment Operations and Maintenance
- Root Cause Analysis/Corrective Action
- Technician Product Certification

CONTINUOUS IMPROVEMENT

- Change Management Skills
- Coaching/Feedback
- Goal Setting
- Innovation Skills
- Leadership Skills
- Process Improvement Skills
- Project Management Skills
- Quality Assurance/Quality Control
- Six Sigma Skills
- Statistical Process Control Skills

COMPUTER SKILLS

- Agile Software Skills
- Change Order System Skills
- Computer-Aided Engineering and Design Tools
- Intermediate/Advanced Microsoft Office Skills
- ISI Proprietary Systems Skills

BUSINESS SKILLS

- Business Acumen
- Communication/Team Building Skills
- Customer Service/Support Skills
- Individuals with Disabilities
 - Accessibility
 - Disability Culture: Sensitivity, Awareness, and Hiring Practices
 - Skills Development for People with Disabilities
- Finance/Accounting Skills
- Marketing/Sales Skills
- Meeting Management

PL Hours

0-60

MANUFACTURING SKILLS (Ratio 1:1)

- Technician Certification
- New Product Training
- Production and Equipment Operations
- Manufacturing Processes
- Process Capability Mapping
- Manufacturing Processes Cross-Training
- Machine Operations, Calibration and Maintenance
- FDA Manufacturing Procedures and Protocols
- Manufacturing Assembly Standards and Procedures

CBT Hours

0-28

BUSINESS SKILLS

- Conflict Management
 - Adapting Your Conflict Style (0.5 hours)
 - Preventing Unhealthy Workplace Conflict (0.5 hours)
 - Working Out and Through Conflict (0.5 hours)
- Communication Skills
 - Being a Receptive Communication Partner (0.5 hours)
 - Building Trust (0.5 hours)
 - Communication Challenges: Navigating Choppy Waters (0.5 hours)
 - Communication Methods that Make Sense – and Make Your Point (0.5 hours)
 - Getting Your Arms Around Arguments (0.5 hours)
 - Interpersonal Communication that Builds Trust (0.5 hours)
 - Issue-focused Negotiation: Are You Ready? (0.5 hours)
 - You and Your Negotiating Counterpart (0.5 hours)
 - Reaching a Negotiated Agreement (0.5 hours)
 - Recovering from Trust Slip-Ups and Erosions (0.5 hours)
- Cardiac Anatomy (0.33 hours)
- Electrosurgery Basics (0.33 hours)
- Gynecological Anatomy (0.33 hours)
- Lower General Surgery (Colorectal) Anatomy (0.33 hours)
- Medical and Surgical Terminology (0.33 hours)
- Si System - Assessment (0.33 hours)
- Si System - Docking (0.33 hours)
- Si System - Draping (0.33 hours)
- Si System - OR Configuration & Power (0.33 hours)
- Si System - Safety Features (0.33 hours)
- Si System - Surgeon Console (0.33 hours)
- Si System - Vision System (0.33 hours)
- Si System Overview (0.33 hours)
- Thoracic Anatomy/Lung Cancer (0.33 hours)
- Upper General Surgery (Foregut) Anatomy (0.33 hours)
- Urogenital Anatomy (0.33 hours)
- Xi System - Assessment (0.33 hours)
- Xi System - Docking (0.33 hours)
- Xi System - Intraoperative Patient Cart Use (0.33 hours)

- Xi System - OR Set-Up & Connections (0.33 hours)
- Xi System - Patient Cart & Draping (0.33 hours)
- Xi System - Surgeon Console (0.33 hours)
- Xi System - Vision System (0.33 hours)
- Xi System Overview (0.33 hours)

CONTINUOUS IMPROVEMENT

- Leadership Skills
 - Achieve Your Objectives through Effective Delegation (0.5 hours)
 - Applying Emotional Intelligence at Work (0.5 hours)
 - Beginning your Coaching Engagement (0.5 hours)
 - Coaching Techniques that Drive Change (0.5 hours)
 - Coaching to Drive Performance (0.5 hours)
 - Getting Agreement (0.5 hours)
 - Successful Delegation: Supervise and Encourage (0.5 hours)
 - The Delegation Process (0.5 hours)
 - Use Delegation to Develop Your Team (0.5 hours)
- Critical Thinking
 - Coming to Terms with Assumptions (0.5 hours)
- Project Management
 - Complete Your Project On-Time and On-Budget (0.5 hours)
 - Get Your Project off the Ground (0.5 hours)
 - Lead Your Project like a Pro (0.5 hours)
 - Plan a Bulletproof Project (0.5 hours)
- Problem Solving
 - Drawing Conclusions with Confidence (0.5 hours)
 - Framing the Problem (0.5 hours)
 - Generating and Evaluating Alternatives (0.5 hours)
- Process Improvement
 - Implementing and Sustaining Change (0.5 hours)
 - Implementing and Sustaining Process Improvement (0.5 hours)
 - Mapping and Measuring to Support Sustainable Process Improvement (.5 hours)
 - Smart Selection, Planned Implementation (0.5 hours)
 - Stakeholder-driven Process Improvement (0.5 hours)
 - Planning for Change (0.5 hours)
 - The Keys to Sustainable Change (0.5 hours)
- Time Management: Quit Making Excuses and Make Time Instead (0.5 hours)
- Time Management: Ready, Set... FOCUS! (0.5 hours)
- Time Management: Too Much to Do and Too Little Time (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, per trainee. PL is capped at 60 hours per-trainee.



TRAINING PROPOSAL AMENDMENT
 The Cheesecake Factory Bakery Incorporated
Approval Type: Panel
Reference Number: 18-0610
Contract Number: 18CS-0159-000

Panel Meeting Date: 05/24/2018
Regional Office: North Hollywood Regional Office
Analyst Name: Paccereili, Margarita
Contract Term Date: 12/11/2017 - 12/10/2019

Revision Number: 1
Requested Date: 03/06/2018
Revision Status: In Executive Review
Effective Date:

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

FUNDING AMENDMENT:

Current Funding (\$)		Requested Funding Increase (\$)		Revised Funding (\$)	
\$252,000.00		\$252,000.00		\$504,000.00	
Training Cost	Admin Cost	Support Cost	Substantial Contribution	Total In Kind	
\$438,261.00	\$65,739.00	N/A	\$0.00	\$2,000,000.00	

PROJECT PROFILE

Repeat Contractor:	Yes			
High Unemployment Area:	No	Turn Over Rate(Applicant):	17.00 %	
Industry Sector		Priority Industry		
Manufacturing		Yes		

AMENDMENT REQUEST DETAILS:

Reason for the Amendment Request:

At the December 2017 panel meeting, we originally requested \$504,000 of ETP funds, but we were only awarded 50% of the requested amount. We are at 70% of our goal and anticipate meeting 100% of the awarded training hours by April 2018 or sooner. We would like to request the remaining 50% of our originally requested amount since we are planning on continuing our intensive training in preparation of the major facility upgrade and beyond the upgrade's completion in June 2018.

REVISED ITEMS:

Costing Group

Attribute	Job Title	No. Trainees		Min Training Hours		Max Training Hours		Estimated Training Hours	
		From	To	From	To	From	To	From	To
Group No. 1 Location: THE CHEESECAKE FACTORY BAKERY INCORPORATED									
S-RET	Food Operations	320	320	8.00	8.00	200.00	200.00	40.00	81.00
	Admin Staff	30	30	8.00	8.00	200.00	200.00	40.00	60.00

Amended Funding Detailed

Funding	Group No.	Attributes	Number Of Trainees	Weighted Average Hours	Reimbursement Rate	Cost Per Trainee	Cost Per Group
OSC	1	S-RET	350	80	\$18.00	\$1,440.00	\$504,000.00
		Funding Total:	350				\$504,000.00
		Grand Total:	350				\$504,000.00

Legend of Attributes	
Code	Description
S	Single Employer
RET	Retrainee

Introduction

The Cheesecake Factory Bakery Incorporated (CFB) is a food producer specializing in cheesecakes, cakes, and assorted desserts that are distributed to restaurants, club stores, food distributors, retail stores, and the military. CFB has over 200 restaurants around the world and two baking facilities in Calabasas Hills and North Carolina. The current Agreement is for training at the baking facility in Calabasas Hills. At the December 2017 Panel Meeting, the initial proposal of \$504,000 was reduced by 50% with the understanding that the CFB could return for the remaining funds once performance warranted additional funding.

Amendment Details

CFB is requesting the Panel to approve this Amendment for the additional \$252,000. Based on the ETP System, CFB has provided 85% of the required hours and anticipate completing 100% (\$252,000) by April 2018. The company invested \$16M to upgrade its baking facility with new equipment. This will change the entire manufacturing process and require workers to be trained in programming, maintenance, troubleshooting, and setup of the new equipment. During this upgrade, the baking facility has been shut down for approximately four months. Instead of laying off the employees during this period, CFB is using the downtime to train them.

Recommendations

Staff recommends approval of this Amendment.

ACTIVE CONTRACT PERFORMANCE

This table summarizes active contract(s) performance for The Cheesecake Factory Bakery Incorporated

Contract Number	Approved Amount	Term	Total No. Trainees (Estimated)	Trainees Enrolled	Trainees Completed Training	Total Trainees Retained
18CS-0159-000	\$252,000.00	12/11/2017 - 12/10/2019	350	117	0	0

Based on the ETP System, for the current contract 149188 reimbursable hours have been tracked for potential earnings of \$2,685,379.50 (1065.63 % of approved amount)

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	Planned Course Offerings
Business Skills	7 Habits
	Accounting
	Coaching
	Communication
	Leadership
	Motivation
	Presentation Skills
	Project Management
	Respectful Teamwork
	Supervisory Skills
	Team Building
	Time Management
	Computer Skills (Standard)
Kronos	
MS Office (Intermediate and Advanced)	
Ross	
Storyline	
Taleo	
Technical Services	
Video/Audio Editing Software	
Literacy Skills	Vocational English as a Second Language (VESL)
Manufacturing Skills (ME) (Standard)	Baker's Math
	Equipment Operations
	Food Safety
	Good Manufacturing Practices
	Machine Maintenance
	Production Skills
	Quality Assurance (Lab and Floor)
	Research & Development
	Sanitation
	Scale Up from Test Runs



TRAINING PROPOSAL FOR
Advanced Composite Products and Technology, Inc.
17-0890

Panel Meeting Date: 05/24/2018
Delegation Order Date: 04/23/2018
Regional Office: San Diego Regional Office
Analyst Name: Maria Ibarra
Type of Proposal: Single Employer (SB), Small Business Program
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 49,842.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 49,842.00	N/A	\$ 0.00	\$ 68,345.00

APPLICANT PROFILE

Company Summary	Advanced Composite Products and Technology, Inc. (ACPT) (www.acpt.com) provides custom development and advanced composite hardware fabrication for research, commercial, government, and private institutions.
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Industry Sector(s)	Manufacturing
Priority Industry	Yes
No. Employees (Applicant)	State: 65 US: 65 World Wide: 65
Turnover Rate (Applicant)	5.00 %
Repeat Contractor	No
High Unemployment Area	No

Union(s)	N/A
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TRAINING PROFILE

Training Objective(s)	Training will provide employees with high-level training and education to become high-performing team members. Training will also improve efficiency and increase productivity.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Job Creation – Retrainee Initiative Program, Retrainee	3	\$ 26.00	39	\$ 1014	8 - 60
2	Retrainee	60	\$ 26.00	30	\$ 780	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1977, ACPT specializes in the development and manufacture of advanced composite materials including filament winding, resin formulation, laminate lay-up, compositing machining, finishing, and clean room preparation of finished goods. The Company designs, analyzes, and fabricates complex products for diverse applications using materials such as graphite, glass, aramid, and other reinforcing fibers to be used in combination with epoxies, polyesters, thermoset, and thermoplastic composites. Customers include General Motors, Boeing, Tyco, BAE Systems, General Dynamics, Lockheed Martin, Aerojet, L3 Communications, Datalog, Martin Marietta, Hamilton Sunstrand, Parker, Raytheon, and Textron.

ACPT's sole location is a 30,000-square-foot facility located in Huntington Beach.

2. Current Training Project Details

Purpose of Training	<p>ACPT's strategic plan is to become a high performing workplace. To do this, the Company must improve its Lean Manufacturing. Training will focus on building manufacturing cells, organizing tools, and standardizing process to provide customers optimized, high-quality products while remaining competitive.</p> <p>Training will also encompass changes or upgrades in equipment to eliminate operator variables and establish improved process controls for the Company's production programs. Equipment upgrades include new filament winding machines, ovens, controllers, and other equipment used to move product from different stages in production.</p>
Training Infrastructure and Administrative Plan	<p>ACPT will utilize an administrative subcontractor. The Company's Owner and Controller will oversee project implementation and overall administration. They will also coordinate with each department to schedule training as well as submit a copy of completed attendance rosters to the third-party administrative subcontractor for uploading into the ETP Online Systems.</p> <p>Training will be conducted by in-house subject-matter experts and vendors (to be determined). The Company is ready to begin training at contract approval.</p>
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

PROPOSED TRAINING PROJECT DETAILS

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
Training in Business, Computer, Continuous Improvement, Hazardous Materials, and Manufacturing Skills will be provided to approximately 63 existing and newly-hired workers.	

4. Additional Company or Training Project Details

Retrainee - Job Creation

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

ACPT is expanding business capacity by hiring new employees to support equipment and facility upgrades. The Company has committed to hiring three new Production Staff (Group 1). The date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. Trainees will be hired into "net new jobs" as a condition of contract.

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Training Funding Source	Seal Beach	\$ 2,900.00
Administrative	Training Funding Source	Seal Beach	Not to exceed 13.00% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	Planned Course Offerings
Business Skills	Communication
	Customer Service Excellence
	Financial Analysis
	Inventory management system
	ISO
	Leadership
	Logistics
	Organizational and time management
	Product data management
	Sales/marketing
	Planning
	Scheduling
	Team Development
Computer Skills (Standard)	AutoCad
	Customer Management
	Enterprise Resource
	Label Matrix barcode
	Microsoft Office
	Query Report Writer
	QuickBooks
	UPS/FEDX Supply Chain
Continuous Improvement Skills	Down-time elimination
	LEAN enterprise
	Process Control
	Research/Development
	Scrap reduction
	Set-up minimization
Hazardous Materials Skills	Hazmat handling
	Industrial Hygiene
Manufacturing Skills (ME) (Standard)	Best Production Methods
	Equipment operation, maintenance, troubleshooting
	Inspection procedures
	Lean Practices
	Material supply chain
	Operational planning and processes
	Production Machinery
	Reliability centered maintenance (RCM)
	Supply Chain management
	Warehouse/ Shipping and Receiving
	Workplace organization/5S



TRAINING PROPOSAL FOR
Always Home Nursing Services, Inc.
17-0966

Delegation Order Date: April 12, 2018
Regional Office: Sacramento Regional Office
Analyst Name: J. Lazarewicz
Type of Proposal: Single Employer
Funding Source: Special Employment Training (SET)

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 48,000.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 48,000.00	N/A	\$ 0.00	\$ 100,000.00

APPLICANT PROFILE

Company Summary	Always Home Nursing Services, Inc. (Always Home Nursing) is a healthcare services company providing continuous skilled in-home nursing care for pediatric patients. The Company's services and staff are available twenty-four hours a day, seven days a week.		
Industry Sector(s)	Healthcare		
Priority Industry	Yes		
No. Employees (Applicant)	State: 350	US: 350	World Wide: 350
Turnover Rate (Applicant)	9.00 %		
Repeat Contractor	No		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Always Home Nursing will train newly hired Registered Nurses (RN) and Licensed Vocational Nurses (LVN) on technical skills designed to improve performance and competency in caring for patients in the home. Trainees will participate in Clinical Preceptor and Didactic training.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Job Creation – Retrainee Initiative Program, Retrainee	40	\$ 20.00	60	\$ 1200	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1992 and headquartered in Citrus Heights, Always Home Nursing is a nurse owned and operated healthcare services company specializing in in-home skilled nursing care for pediatric patients in the greater Sacramento area. The Company works with patients who have complex medical conditions, are often permanently disabled and require extended or continuous care. Always Home Nursing's services include providing feeding tubes, tracheostomy care and suctioning, medication administration, respiratory treatments, and ventilator monitoring. This will be Always Home Nursing's first ETP Agreement.

2. Current Training Project Details

Purpose of Training	<p>Didactic and preceptor Medical Skills training will be delivered to all trainees. 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 training. The Panel has established a higher reimbursement rate of \$22 per hour for medical skills training, recognizing the higher cost of delivery for the Clinical Preceptor and Didactic models.</p> <p>Always Home Nursing reports a continued increase in demand for RN's and LVN's specializing in in-home skilled nursing care. To meet demands, the Company must provide nurses with the skills to face complex in-home healthcare challenges. Training courses such as Mechanical Ventilation, Suction Machines, Tracheotomy, and Enteral Feeding will ensure trainees have the technical skills necessary to meet these challenges. Medical Skills training will also ensure trainees have the skill sets, education and experience necessary to meet the changing needs of patients.</p> <p>Furthermore, standards and regulations are continually changing in the healthcare industry. This requires training on Quality Assurance, Regulatory Updates, and HIPPA to remain in compliance with state and federal health care requirements.</p>
Training Infrastructure and Administrative Plan	<p>Always Home Nursing has a detailed training plan in place and is ready to begin training upon approval. The Director of Nursing and a Project Manager will be dedicated to plan and oversee all aspects of training including scheduling, collecting rosters, verifying training and retention completion, and participating in ETP monitoring activities. Staff is committed to the success of this agreement and will ensure all ETP requirements are satisfied. Training will be provided by in-house subject matter experts at Always Home Nursing's Citrus Heights location.</p>
Marketing Plan (MEC Only)	N/A

PROPOSED TRAINING PROJECT DETAILS

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

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations will receive training in Continuous Improvement and Medical Skills (Preceptor and Didactic) topics (Attachment 2).	

Delivery Method/Level	E-Learning - Computer Based Training (CBT)
Summary	
All occupations will receive Computer-Based Training (CBT) in Continuous Improvement topics (Attachment 2).	

4. Additional Company or Training Project Details

Retrainee - Job Creation

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

Always Home Nursing has committed to hiring 40 RN's and LVN's (Group Number 1) to support the Company's effort to improve patient care and enhance its overall scope of services.

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

PROPOSED TRAINING PROJECT DETAILS

4.1 Program Waivers

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

Waivers	Description
Retention Period for Occupations/Trades	For Nurses and Allied Healthcare workers, the definition of full-time employment may be modified from an average of 35 hours a week to an average of 32 hours a week in a 90-day period. Retention for these workers may also be satisfied by working at least 500 hours within 272 consecutive days.

4.2 Subcontractor Summary

N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>	
Training Type (Level)	Planned Course Offerings	
Continuous Improvement Skills	Quality Assurance	
	Regulatory Updates	
Medical Skills (didactic)	Cardiovascular Conditions	
	CPR/Code Status	
	Disaster Planning	
	Documentation	
	Emergency Procedures	
	Endocrine system	
	Enteral Feeding	
	Gastrointestinal System	
	Genitourinary Tract	
	Home Care Etiquette	
	Integumentary System	
	Mechanical Ventilation	
	Medication Administration	
	Musculoskeletal System	
	Neurological Conditions	
	Pain Assessment and Management	
	Patient Rights	
	Plan of Care and MD Orders	
	Reporting of Abuse/Neglect	
	Respiratory Care	
Resuscitation		
School Nursing		
Suction Machines		
Tracheotomy		

<i>Delivery Method /Level</i>	<i>E-Learning – Computer Based Training (CBT)</i>	
Training Type (Level)	Planned Course Offerings	Standard Hours
Continuous Improvement Skills	HIPPA Compliance	2.00

<i>Delivery Method /Level</i>	<i>Productive Laboratory</i>	
Training Type (Level)	Planned Course Offerings	
Medical Skills (preceptor)	Cardiovascular Conditions	
	Documentation	
	Endocrine System	
	Enteral Feeding	
	Gastrointestinal System	
	Genitourinary Tract	

Attachment 2 - Training Delivery and Curriculum Listing

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

	Integumentary System
	Mechanical Ventilation
	Medication Administration
	Musculoskeletal System
	Neurological Conditions
	Pain Assessment and Management
	Respiratory Care
	Resuscitation
	Suction Machines
	Tracheotomy
PL Justification and Details	
Explain the need for productive laboratory (PL) training	Need for (PL) exist to ensure Registered Nurses and Licensed Vocational Nurses are adequately trained to preform necessary treatments safely. These trainings entail both lab and hands on training.
Describe the Equipment/Processes to be used in delivering the PL training	Specific to the patient condition/ devices used.
Describe Trainer Qualifications	Registered Nurse Supervisor with BSN. At least 2 out of the last 5 years experience in acute patient care. Meets requirements set forth in title 22 regulations.
Trainer to Trainee Ratios - If more than one PL class the ratios are the lowest and the highest trainer-to-trainee ratio	Trainer
	Trainee
Ratio for One Class, or Minimum When More than One Class	1
Ratio for Maximum Ratio When More than One Class	1
PLT Approval	Yes

DELEGATION ORDER



**Retrainee - Job Creation
Training Proposal for:
ATS Workholding, LLC dba ATS Systems**

Small Business

ET18-0208

Approval Date: April 23, 2018

ETP Regional Office: San Diego

Analyst: J. Davey

CONTRACTOR

- Type of Industry: Manufacturing
Priority Industry: Yes No
- Number of Full-Time Employees
California: 45
Worldwide: 63
Number to be trained: 50
Owner Yes No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): Yes No
- High Unemployment Area (HUA): Yes No
- Turnover Rate: 16%
- Repeat Contractor: Yes No

FUNDING

- Requested Amount: \$49,920
- In-Kind Contribution: \$64,950

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, HazMat, Manufacturing Skills	45	8-120	0	\$988	\$17.50
				Weighted Avg: 38			
2	Retrainee Job Creation Initiative Priority Rate SB <100	Business Skills, Computer Skills, Continuous Impr, HazMat, Manufacturing Skills	5	8-120	0	\$1,092	*\$14.58
				Weighted Avg: 42			

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

- Reimbursement Rate: \$26 SB Priority
- County(ies): Orange
- Occupations to be Trained: Administrative Staff, Customer Relations Staff, Managers/Supervisors, Production Staff
- Union Representation: Yes
 No
- Health Benefits: Up to \$2.50 per hour

SUBCONTRACTORS

- Development Services: Training Funding Source (TFS) in Seal Beach assisted with development for a flat fee of \$2,900.
- Administrative Services: TFS will also provide project administration services for an amount not to exceed 13% of earned funds.
- Training Vendors: To Be Determined

OVERVIEW

Located in Rancho Santa Margarita, ATS Workholding, LLC dba ATS Systems (ATS) is a CNC machining workholding and high-pressure coolant manufacturer. The Company provides a wide range of workholding and automation accessories that make metal-cutting machine tools more useful and productive. The Company also manufactures high pressure pumping and coolant systems for CNC machines. ATS products are used to make other products by machine shops and other manufacturers.

Need for Training

This will be ATS's second ETP contract and the second in the last five years. In its first ETP project, ATS provided training to remain competitive in the metal machine tools industry by improving the overall business efficiency and increasing production output. The Company adopted a new Lean Manufacturing initiative to reduce waste and identify redundancy in workflow and internal processes. Training also focused on utilizing Estimating Software, Production Planning, ISO, and HazMat.

This proposal will focus on recent business changes, namely new products and software/program modules. ATS recently introduced two new product lines: Cellro, a robotic line that automates manufacturing needs for various industries and a new high-pressure coolant system and accessories. Employees will be trained in the programming, troubleshooting, installing, wiring, marketing, and sales of these new product lines. The Company will also train employees on new software and updates.

Additionally, ATS will be expanding its market base by targeting new customers and projects to increase the number of workers needed over the next three years. Training in Business Skills will transform employees into a knowledgeable, highly-skilled, efficient workforce that will allow the Company to remain viable in the marketplace.

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.

Job order volume is expected to increase by 40% in the third quarter of this year, as the Company hires additional employees. To meet this employment growth, ATS recently moved to a new facility, twice the size of its previous location. The Company expects to hire 5 new staff (Job Number 2) to support its growing business. These new employees will need extensive training in the Company's systems and processes in order to meet the Company's business needs.

To be eligible for reimbursement, trainees must be hired within the three-month period prior to Panel approval or during the term of contract. Trainees will be hired into "net new jobs" as a condition of contract.

Training Plan

While most of the training in this proposal is the same as the training in its first project, trainees who have received training in the first project will receive only needed training they did not receive in the first project. Training is scheduled to start immediately upon project approval. All training will be conducted via Class/Lab.

The following are some of the topics included in the Menu Curriculum, Exhibit B of the Agreement under the proposed types of training:

Business Skills – Coaching and Leadership Skills, Sales and Marketing Skills, Strategy Deployment Processes and Finance/Accounting Skills

Manufacturing Skills – Inspection Techniques, Equipment Operations, Daily Status Packaging

Computer Skills – MRP Software, Engineering Design Software

Continuous Improvement – Lean Manufacturing, Process Improvement

Hazardous Materials – HazMat Communications, HazOps

Modifications

ATS requests an increase in the maximum range of hours from 60 to 120. The Company foresees training some trainees (3-5) for more than 60 total hours of training. In addition, the Company is requesting a 2-year agreement term so that it has adequate time to deliver necessary training.

Training Infrastructure

ATS’s CFO will assist in scheduling training and ensuring that training can support ongoing employee development. Additional internal staff will assist in collecting rosters and working with Training Funding Source, an administrative subcontractor, to ensure proper and timely administration. Training will be conducted by a combination of internal trainees and vendors (to be determined).

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ (%)
ET16-0294	Rancho Santa Margarita	12/1/2015– 11/30/2017	\$49,140	\$49,140 (100%)

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

8 – 120 Trainees will receive any of the following:

BUSINESS SKILLS

- Coaching
- Finance/Accounting Procedures
- International Traffic in Arms Regulations (ITAR)
- Leadership
- Planning
- Product Knowledge
- Project Management/Program Management
- Sales and Marketing
- Strategy Deployment Process (X-Matrix)
- Train the Trainer
- Work Processes/Procedures

COMPUTER SKILLS

- Calibration Manager
- Engineering Design Software --Solidworks
- MS Office
- MRP Software (MASS & Sales Logix)
- Payroll Processing
- Project Management

CONTINUOUS IMPROVEMENT SKILLS

- 5S
- Lean Process Improvement/Kaizen
- Process Improvement
- Problem Solving/Six Sigma Process Controls
- Quality Improvement

HAZARDOUS MATERIALS SKILLS

- HazMat Communications
- HazOps

MANUFACTURING SKILLS

- Daily Status Package/Operational Strategy Execution
- Equipment Operation, Maintenance & Troubleshooting
- Good Manufacturing Processes
- Inspection Techniques
- Proper Care of Inspection Tools
- Proper inspection Tool Selection
- Quality Assurance Equipment

Note: Reimbursement for retraining is capped at 120 total hours per-trainee, regardless of method of delivery.



TRAINING PROPOSAL FOR
Bayley Construction, LP
18-0591

Panel Meeting Date: 05/24/2018
Regional Office: San Diego Regional Office
Analyst Name: Cassandra Clady
Type of Proposal: Single Employer (SB), Small Business Program
Funding Source: Out-of-State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$24,960.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$24,960.00	N/A	\$0.00	\$35,000.00

APPLICANT PROFILE

Company Summary	Bayley Construction, LP (Bayley) (www.bayley.net) is a commercial construction general contractor. Projects include state-of-the-art sports facilities to highly complex theme parks nation wide.
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Industry Sector(s)	Construction
Priority Industry	Yes
No. Employees (Applicant)	State: 43 US: 197 World Wide: 197
Turnover Rate (Applicant)	10.00 %
Repeat Contractor	No
High Unemployment Area	No
Union(s)	Southern California District Council of Laborers, Local 724; Carpenters Local 803

TRAINING PROFILE

Training Objective(s)	Training will improve the efficiencies necessary to remain competitive, and allow the Company to keep up with increased customer demands.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	40	\$26.00	24	\$624	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1963 and headquartered in Lake Forest, Bayley is a full service general contractor with offices in Washington, Arizona and California. Customers include the education, retail, entertainment, office, sports and government building sectors. Other target customers are health care (medical office buildings and assisted senior living facilities).

Training will take place at the Lake Forest facility for this first time ETP Agreement.

2. Current Training Project Details

Purpose of Training	<p>Bayley reports that the construction industry is taking a big step into combining the latest technology with traditional construction procedures. The Company is following this trend by expanding into new project management areas, such as delivery methods and software. This requires employees to be versed in evolving industry language, procedures, practices and the latest computer programs.</p> <p>A large portion of Bayley employees work in teams. Cross-training each employee on each facet of projects will increase productivity and quality, reduce errors and allow Bayley to stay competitive. Cross-training will help staff to become better qualified to answer questions for pricing/estimating projects.</p> <p>Bayley will also train in subcontract writing, emergency response - fall protection, customer focus relationship & networking, budget forecasting; and what is new in the industry. Training will enable employees to become more knowledgeable and promote within the Company.</p>
Training Infrastructure and Administrative Plan	<p>The ETP Project will be overseen by the Vice President/Division Manager and Human Resource Manager. Both will manage training, scheduling, enrolling trainees, track training hours and meet with ETP staff.</p> <p>Training to be delivered by in-house experts.</p>
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

PROPOSED TRAINING PROJECT DETAILS

3. Curriculum Summary

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

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

4. Additional Company or Training Project Details

N/A

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Budgeting
	Business Development
	Business Performance
	Communication Skills
	Estimating
	Project Management
Commercial Skills (Safety)	Asbestos Silica Training (Trades persons only)
	Emergency Response (Trades persons only)
	Fall Protection (Trades persons only)
	Injury Illness Prevention Program (Trades persons)
	OSHA 10/30
	Scaffolding (Trade Persons only)
Computer Skills (Standard)	Accounting Systems
	BIM
	BlueBeam
	Marketing Software
	Microsoft Office Software
	Multimedia
	PlanGrid
	Project Management Software
Continuous Improvement Skills	Strategic Planning
Management Skills	Leadership



**SOUTHERN CALIFORNIA DISTRICT COUNCIL
OF
LABORERS**

AFFILIATED WITH
LABORERS' INTERNATIONAL UNION OF NORTH AMERICA, AFL-CIO

SERGIO RASCON
President

ERNESTO J. ORDONEZ
Secretary-Treasurer

JON P. PRECIADO
Business Manager

4399 Santa Anita Ave. • Suite 205 • El Monte, CA 91731 • Tel (626) 350-6900 • Fax (626) 350-7583

January 5, 2018

AFFILIATED LOCALS

**SOUTHERN
CALIFORNIA**

BURBANK
LOCAL 345

HOLLYWOOD
LOCAL 724

LONG BEACH
LOCAL 1309

LOS ANGELES
LOCAL 300

ORANGE COUNTY
LOCAL 652

POMONA
LOCAL 1414

RIVERSIDE-IMPERIAL
COUNTIES
LOCAL 1184

SAN BERNARDINO
INYO-MONO COUNTIES
LOCAL 783

SAN DIEGO
LOCAL 89

VENTURA
LOCAL 585

KERN COUNTY
SAN LUIS OBISPO COUNTY
SANTA BARBARA COUNTY
LOCAL 220

ARIZONA
PHOENIX
LOCAL 383

NEW MEXICO
ALBUQUERQUE
LOCAL 16

Cassandra Clady
Contract Analyst
Employment Training Panel
9095 Rio San Diego Drive, Suite 320
San Diego, CA 92108

RE: Application to Employment Training Panel for Bayley Construction

Dear Panel Members:

On behalf of The Southern California District Council of Laborers, I would like to express my support for the proposed training application being submitted by Bayley Construction to the Employment Training Panel.

Our members are dispatched with a level of training that allows them to explore many opportunities within the construction industry, and the grant funds from the ETP will bring additional training that Bayley Construction can provide to our members.

Should you have any questions, or need additional information, please feel free to contact my office.

Sincerely,

Jon P. Preciado
Business Manager
Southern California District Council of Laborers



Carpenters Local Union 803

AFFILIATED WITH SOUTHWEST REGIONAL COUNCIL OF CARPENTERS

PETE RODRIGUEZ
President

FAVIAN GUILLEN
Recording Secretary

RICHARD M GOMEZ
Financial Secretary-Treas.



January 12, 2018

Cassandra Clady
Contract Analyst
Employment Training Panel
9095 Rio San Diego Dr., Suite 320
San Diego, CA 92108

RE: Application to Employment Training Panel for Bayley Construction

Dear Panel Members:

I would like to inform you that Bayley Construction is a signatory contractor with the Southwest Regional Council of Carpenters. The Carpenters Union is in full support of Bayley Construction's proposed training application submitted to the Employment Panel.

If you should have any questions or concerns regarding this matter please contact our office at 714-978-6232.

Thank you,

Rich Gomez
Financial Secretary-Treas.

DELEGATION ORDER



**Retrainee - Job Creation
Training Proposal for:
BVOH, LLC**

Small Business

ET18-0222

Approval Date: May 9, 2018

ETP Regional Office: San Francisco Bay Area

Analyst: A. Townsend

CONTRACTOR

- Type of Industry: Services
Financial Services
Priority Industry: Yes No

- Number of Full-Time Employees
California: 24
Worldwide: 24
Number to be trained: 24
Owner Yes No

- Out-of-State Competition: No OSC
- Special Employment Training (SET): Yes No
- High Unemployment Area (HUA): Yes No
- Turnover Rate: 13%
- Repeat Contractor: Yes No

FUNDING

- Requested Amount: \$34,848
- In-Kind Contribution: \$55,850

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET	Business Skills, Computer Skills, Commercial Skills, Continuous Impr	24	8-60	0	\$1,012	\$30.36
				Weighted Avg: 46			
2	Retrainee Job Creation Initiative SET	Business Skills, Computer Skills, Commercial Skills, Continuous Impr	8	8-60	0	\$1,320	\$15.18
				Weighted Avg: 60			

- Reimbursement Rate: \$22 SB Non-Priority
- County(ies): San Francisco
- Occupations to be Trained: Administrative Staff, Owners, Recruiters, Sales Staff
- Union Representation: Yes
 No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: Training Funding Source in Seal Beach developed this proposal for a flat fee of \$1,900.
- Administrative Services: Training Funding Source will also assist with administration for a fee not to exceed 13% of earned funds.
- Training Vendors: Sandler Training in Irvine will provide Business Skills training.

OVERVIEW

Established in 2009 and headquartered in San Francisco, BVOH, LLC (BVOH) is a consulting and recruiting firm that provides temporary, permanent and direct hire services specializing in the Accounting and Finance industries for the Bay Area. This will be BVOH’s first ETP proposal.

Need for Training

A shortage of qualified Accounting and Finance employees in the Bay Area has allowed BVOH to grow. Originally, the Company’s recruitment was limited to San Francisco. However, due to growing need for recruitment services, the Company recently expanded its services to the

surrounding Bay Area, requiring the Company to improve its recruitment process. To do this, the Company recently purchased and will be implementing a new Applicant Tracking System/Customer Relationship Management (Compas) and LinkedIn Recruiter to efficiently recruit candidates. These tools require many hours of training involving technical operation and procedures. Additionally, with expanded services, the Company will need to improve processes and customer service.

Retrainee-Job Creation

BVOH is expanding business capacity by adding new employees due to the expansion of business territory. The Company has committed to hiring eight new employees (four Recruiters, three Sales Personnel, and an Administrative Staff) within the term of the contract. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. Trainees will be hired into “net new jobs” as a condition of contract.

Training Plan

All training will be delivered as Class/Lab.

Business Skills: This training will be offered to all occupations. Training will cover all facets of planning, client building relationships, customer service and communication, coaching, marketing, business development, and presentation. Trainees will acquire new skills that will exceed customer expectations.

Commercial Skills: This training will be offered to all occupations. Trainees will receive skills upgrade of processes associated with the implementation of software programs. Training will improve quality of services.

Computer Skills: Training will be offered to all occupations. The new systems will give employees tools for identifying and focusing on effective candidate selection. Trainees will increase efficiencies in appointment management, attendance system, data tracking, accounting, payroll processing and risk management. These skills are necessary to synchronize operations for consistent recruitment procedures.

Continuous Improvement: This training will be offered to all occupations. Training in business planning, development, change management, performance indicators, problem solving and team building are necessary for a productive workforce.

➤ Training Infrastructure

BVOH is ready to start training upon approval of this proposal. The VP of Operations will oversee training and project administration. Training will be provided at the Company's San Francisco facility by a combination of in-house experts and Sandler Training. The Company also retained Training Funding Source to assist with administrative duties.

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

- ✦ Client Visits/Relations
- ✦ Coaching/Communication
- ✦ Conflict Resolution
- ✦ Contract Negotiation/Admin
- ✦ Email & Phone Etiquette
- ✦ Leadership
- ✦ Marketing & Business Development
- ✦ Meeting Efficiency
- ✦ Planning / Presentation
- ✦ Sales
- ✦ Succession Planning
- ✦ Time Management/Multi-Tasking
- ✦ Work Processes

COMMERCIAL SKILLS

- ✦ Accounting Principles (General Ledgers, Debits and Credits)
- ✦ Bank Wiring/ Reconciliations
- ✦ Lock Box Instructions
- ✦ Product and Service Knowledge
- ✦ Reporting Requirements

COMPUTER SKILLS

- ✦ Account Set-Up
- ✦ Activity Metrics Development and Tracking
- ✦ Applicant Tracking System (ATS)- Compas
- ✦ Background Checks
- ✦ Database Management
- ✦ Implementations - New Clients
- ✦ Marketing Tools
- ✦ Microsoft Office
- ✦ Payroll Processing
- ✦ Phone Call Accounting
- ✦ Risk Management
- ✦ Attendance Systems
- ✦ Task and Appointment Management

CONTINUOUS IMPROVEMENT

- ✦ Business Planning and Development
- ✦ Change Management
- ✦ Key Performance Indicators
- ✦ Process/Quality/Performance Improvement
- ✦ Problem Solving Skills
- ✦ Teambuilding

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



**Retrainee - Job Creation
Training Proposal for:
Casco Contractors, LLC**

Small Business

ET18-0204

Approval Date: March 29, 2018

ETP Regional Office: San Diego

Analyst: M. Ibarra

CONTRACTOR

- Type of Industry: Construction
Services
Priority Industry: Yes No
- Number of Full-Time Employees
California: 66
Worldwide: 66
Number to be trained: 68
Owner Yes No
- Out-of-State Competition: No OSC
- Special Employment Training (SET): Yes No
- High Unemployment Area (HUA): Yes No
- Turnover Rate: 10%
- Repeat Contractor: Yes No

FUNDING

- Requested Amount: \$49,504
- In-Kind Contribution: \$78,389

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET SB <100 Priority Rate	Business Skills, Comm'l. Skills, Computer Skills, Cont. Imp., HazMat. OSHA 10/30, PL-Comm'l Skills	63	8 - 60	0	\$728	\$22.77
				Weighted Avg: 28			
2	Retrainee SET SB <100 Priority Rate Job Creation	Business Skills, Comm'l. Skills, Computer Skills, Cont. Imp., HazMat. OSHA 10/30, PL-Comm'l Skills	5	8 - 60	0	\$728	*\$14.58
				Weighted Avg: 28			

*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): Orange
- Occupations to be Trained: Administrative Staff, Field Installer, Project Lead
- Union Representation: Yes
 No
- Health Benefits: Job #'s 1 & 2: \$2.50 per hour

SUBCONTRACTORS

- Development Services: Training Funding Source (TFS) in Seal Beach assisted with development for a flat fee of \$2,900.
- Administrative Services: TFS will also assist with administrative services for a fee not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

OVERVIEW

Founded in 200 and located in Irvine, Casco Contractors, Inc. (Casco) (www.cascocontractors.com) is a woman-owned general contractor specializing in commercial tenant improvement construction. The Company also provides property maintenance services to customers such as Southern California Edison, Real Office Centers, El Pollo Loco, Marriott,

Kerstin Florian, Irvine Company, Square Milner, Coldwell Banker and Richard Ellis, Regus and Semptra Energy.

This will be Casco's second ETP Agreement, and the second in last five years. In its previous project, the Company was able to provide training to implement technological and process improvement initiatives to support all aspects of project delivery. Training in this proposal is driven by continued growth with increased customer demands. The Company states that in the last three years, Casco experienced continuous increase in revenue, with 20% growth in 2017. In addition, the majority of Casco's construction jobs are in occupied commercial buildings where the need for quality professional work is mandatory. In this proposal, some curriculum topics are repeated from the prior agreements; however, Casco ensures that the subject matter has been updated and/or improved, thus, no duplication of training in those courses.

To address increased customer demands, Casco is committed to hire new employees, implement organizational changes, and increase utilization of various computer programs. Specifically, the Company plans to add staff to a new Architectural Department to design building interiors and exteriors in-house. Casco also plans to develop new and revise operating procedures as well as implement new and upgrade existing computer systems including Sage, Omni-form, On Center, Laptop Interface with Casco System, Master Builder and Construction Management Software. These procedures and programs will allow Casco to improve construction project management and connect all departments to help streamline employee responsibilities to improve efficiency and shorten work completion time.

ETP funding will continue to assist the Company provide trainees with skills to improve construction techniques and exceed customer expectations and compete with large general contractors and remain viable in the construction industry.

Retrainee - Job Creation

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

Due to the expansion of existing business capacity to its current services, the Company has committed to hire five workers: three Field Installers and two Administrative Support (Job Number 2). The date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

Special Employment Training (SET)

Under SET, the Company is not required to demonstrate out-of-state competition. Trainees must be earning at least the statewide average hourly wage at the end of the retention period.

➤ Wage Modification

For trainees employed in a priority industry, the Panel may modify the SET Wage (\$30.36) up to 25% below the statewide average hourly wage to \$22.77. The Company is requesting a wage modification to train entry-level workers in lower wage occupations (Job Number 1) to provide opportunities for promotion, wage increase, and long-term job security.

Training Plan

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

Business Skills: Change Management, Coaching Skills, Collaboration, Communication, Conflict Management, Leadership, Planning, Product Knowledge and Customer Satisfaction.

Commercial Skills: Trenching, Excavation, Concrete and Masonry, Equipment Operations, Installation Procedures, Field Operational Procedures, Ramset and Walk Through Procedures.

Computer Skills: AutoCAD, Blue Beam, Sage and the Company's Construction Management System.

Continuous Improvement: Quality Systems and Procedures, Productivity Improvement, Process Improvement, Team Building, Problem Solving and Decision Making.

Certified Safety Training

1. OSHA 10/30. This training is a series of courses "bundled" by industry sector and occupation. It consists of 10 hours of classroom or CBT training for journey-level workers and 30 hours for frontline supervisors. The coursework is geared to construction work, and also manufacturing. Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.
2. Hazardous 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, Field Staff will receive up to 32 hours of training. Field training may be required, although not funded by ETP. Completion of the training results in a certificate that expands employment opportunities. This coursework is not under Cal-OSHA, but is administered under the Department of Transportation and CalTRANS. There are various certification entities for the coursework and instructors. In this proposal, the certification is by Haztrainer.

Productive Laboratory – Commercial Skills

Productive Lab (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.

Casco requests PL training in Commercial Skills topics such as Trenching, Excavation, Concrete and Masonry, Equipment Operations, Field Operational Procedures, Installation Procedures, Job Costing, Ramset, Scaffold Erection Guidelines, Site Logistics, SWPPP, Underground Utility, Work Zone Procedures, Walk Through Procedures, and Zero Punch List. PL Training will be delivered with a 1:1 trainer-to-trainee ratio to approximately 36 existing and newly-hired Installers. Trainees may receive all their training hours in PL-Commercial Skills (up to 24 hours) or a combination of class/lab including PL hours. Training will be specific to type of equipment and/or process to ensure trainees receive a broader understanding of the entire construction process.

Trainers will be qualified and/or machine-certified to instruct and deliver the course content and material. Trainers are responsible for directing the operations and instructions as well as providing immediate feedback to the trainee as work is performed.

Training Infrastructure

The Director of Human Resources will oversee project implementation and overall administration. Administrative staff will schedule training and submit a copy of completed attendance rosters to the third-party administrative subcontractor (TFS) for uploading in the ETP Online Systems.

Training will be conducted by in-house experts and vendors as needed. The Company is ready to begin training upon contract approval.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0332	Irvine	12/9/14 – 12/8/16	\$42,276	\$42,276 (100%)

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

8 - 60

Trainees may receive any of the following:

BUSINESS SKILLS

- + Administrative Procedures
- + Change Management
- + Budget Skills
- + Coaching Skills
- + Collaboration
- + Communication
- + Conflict Management
- + Construction Finance
- + Construction Procedures
- + Customer Application for Payment
- + Customer Satisfaction
- + Developing New Opportunities
- + Leadership
- + Planning
- + Performance Management
- + Product Knowledge
- + Risk Management

COMMERCIAL SKILLS

- + Competent Person, Trenching
- + Competent Person, Excavation
- + Concrete and Masonry
- + Equipment Operations
- + Field Operational Procedures
- + Installation Procedures
- + Job Cost
- + Materials Handling and Storage
- + Power Tool Use and Guarding
- + Ramset
- + Scaffold Erection Guidelines
- + Scaffold Awareness
- + Site Logistics
- + Storm Water Pollution Prevention Program
- + Trenching and Excavation Awareness
- + Underground Utility
- + Walk Through Procedures
- + Workzone Traffic Control
- + Zero Punch List

COMPUTER SKILLS

- + AutoCAD
- + ADP Workforce Now
- + Blue Beam
- + Laptop Interface with Casco System
- + Microsoft Office, Project
- + New Pro Core Construction Management Software
- + Omni-Form

- ✚ On Center (on screen take off)
- ✚ Revit
- ✚ Sage
- ✚ Time Tracking
- ✚ Upgraded Master Builder
- ✚ Website

CONTINUOUS IMPROVEMENT

- ✚ Process Improvement
- ✚ Productivity Improvement
- ✚ Quality Systems and Procedures
- ✚ Team Building
- ✚ Problem Solving
- ✚ Decision-making

HAZARDOUS MATERIALS

- ✚ Explosives
- ✚ Flammable Liquids
- ✚ Gases
- ✚ Hazard Communication (HazCom)
- ✚ Material Safety Data Sheet (MSDS)
- ✚ Toxic and Infectious Substances

OSHA 10/30 (Certified OSHA Instructor)

- OSHA 10 (requires 10 hours completion)
- OSHA 30 (requires 30 hours completion)

Productive Lab

0 - 24

COMMERCIAL SKILLS (Ratio: 1:1)

- ✚ Competent Person, Trenching
- ✚ Competent Person, Excavation
- ✚ Concrete and Masonry
- ✚ Equipment Operations
- ✚ Field Operational Procedures
- ✚ Installation Procedures
- ✚ Job Costing
- ✚ Ramset
- ✚ Scaffold Erection Guidelines
- ✚ Site Logistics
- ✚ Storm Water Pollution Prevention Program
- ✚ Underground Utility
- ✚ Work Zone Procedures
- ✚ Walk Through Procedures
- ✚ Zero Punch List

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 60 total hours, per trainee, regardless of method of delivery. PL is capped at 24 hours, per trainee.



**TRAINING PROPOSAL FOR
Compound Solutions Inc.
17-0894**

Panel Meeting Date: 05/24/2018
Regional Office: San Diego Regional Office
Analyst Name: Kellen Hernandez
Type of Proposal: Single Employer (SB), Small Business Program
Funding Source: Out-of-State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$19,690.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$19,690.00	N/A	\$0.00	\$35,000.00

APPLICANT PROFILE

Company Summary	Compound Solutions, Inc. (CS) (www.compoundsolutions.com) is a wholesale distributor of vitamins, amino acids and nutraceutical ingredients to the global nutritional supplement, sports nutrition, food and beverage, pharmaceutical and personal care industries.
------------------------	--

Industry Sector(s)	Trade (Wholesale)
Priority Industry	No
No. Employees (Applicant)	State: 19 US: 22 World Wide: 22
Turnover Rate (Applicant)	5.00 %
Repeat Contractor	No
High Unemployment Area	No
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Training will help CS introduce new products to the market and position itself for growth opportunities. Training is critical for staff to develop the skills necessary to manage increased customer demand and increase new product production.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Owner, Retrainee	1	\$22.00	40	\$880	8 - 60
1	Retrainee	18	\$22.00	40	\$880	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	3	\$22.00	45	\$990	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1998 and located in Carlsbad, CS is a science-based company that represents and distributes patented vitamins, amino acids and nutraceutical ingredients. These patented products include TeaCrine, goBHB, goKE, and InstAminos, which are scientifically designed to maximize the physical and mental performance of the end user.

CS customers includes manufacturers in nutritional supplements, sports performance supplements, functional food and beverage, nutraceutical, pharmaceutical and personal care (cosmetics) industries. Over 80% of CS' customer base is located outside California; and over 90% of its revenue is generated by out-of-state customers.

This will be CS' first ETP Agreement.

2. Current Training Project Details

Purpose of Training	<p>To respond to increased customer demand, CS is launching new patented nutraceutical products. These new products create a need for Product Knowledge, Sales and Marketing training for Admin/Support Staff. Staff must have a detailed knowledge of each product, how the product was formulated (the particle size, taste, pH, solubility, flavor and bulk density) the benefits of the active ingredients, what ingredients can be mixed, and other factors. Sales and Marketing training will focus on effectively launching a market expansion strategy to sell products to new customers in the weight loss, food and beverage, ketogenic food manufactures and personal care industries.</p> <p>CS is also pursuing the NSF International (NSF) certification through the Public Health and Safety Organization (PHSO). This certification focuses on product and ingredient safety with strict standards and procedures defined by PHSO. The Company must rewrite it's standard operating procedures (SOP's) to comply with NSF certification. Therefore, all occupations will train on the new SOPs, Good Manufacturing Practices and Quality Control. The majority of the training plan is committed to hours for these critical business/industry needs.</p>
Training Infrastructure and Administrative Plan	<p>The CEO, President, Sales Director and Office Manager will organize and deliver training. The Office Manager will oversee all documentation and correspond with ETP staff. CS retained Prospect Consulting Group (PCG) to assist with administrative services including coordinate trainee enrollment and track training hours. CS is ready to begin training upon project approval. Training will be delivered by in-house experts and vendors as needed.</p>

PROPOSED TRAINING PROJECT DETAILS

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

3. Curriculum Summary

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

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

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

4. Additional Company or Training Project Details

Retrainee – Job Creation

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be reimbursed at a higher rate and trainees will be subject to a lower post-retention wage. CS has committed to hiring at least three new employees (Group Number 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into “net new jobs” as a condition of contract.

There is strong customer demand for nutraceutical ingredients, and CS is launching new patented ingredients. To meet this increased demand, The Company must expand its workforce and anticipates hiring Admin/Support Staff to focus on new client acquisition and market expansion for new ingredients. The Company has invested in new iPhones, laptops and software subscriptions for staff.

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

N/A

PROPOSED TRAINING PROJECT DETAILS

4.3 Subcontractor Summary

CS has retained the services of the following Subcontractor.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Prospect Consulting Group, Inc.	San Francisco	\$1,000.00
Administrative	Prospect Consulting Group, Inc.	San Francisco	13% of payment earned
Training	None selected to date	N/A	N/A

4.4 Previous ETP Project Summary

N/A

4.5 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Sales and Marketing Skills
Commercial Skills (Standard)	Good Manufacturing Practices Training
	NSF Certification Training
	Product Knowledge Training
Computer Skills (Standard)	DocuSign
	Electronic Data Interchange Software
	Intermediate/Advanced Microsoft Excel
	Monday.com Project Management
	New Technology for Growth
	Sage ERP/CRM Software
Continuous Improvement Skills	Quality Control Training
	Standard Operating Procedures Training

<i>Delivery Method /Level</i>	<i>E-Learning – Instructor Led/Distance Learning</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Sales and Marketing Skills
Commercial Skills (Standard)	Good Manufacturing Practices Training
	NSF Certification Training
	Product Knowledge Training
Computer Skills (Standard)	DocuSign
	Electronic Data Interchange Software
	Intermediate/Advanced Microsoft Excel
	Monday.com Project Management
	New Technology for Growth
	Sage ERP/CRM Software
Continuous Improvement Skills	Quality Control Training
	Standard Operating Procedures Training



**Training Proposal for:
Dauntless Industries, Inc. dba Dauntless Molds**

Small Business

ET18-0227

Approval Date: May 8, 2018

ETP Regional Office: North Hollywood

Analyst: M. Paccarelli

CONTRACTOR

- Type of Industry: Manufacturing
- Number of Full-Time Employees
 - California: 30
 - Worldwide: 30
 - Number to be trained: 29
- Priority Industry: Yes No
- Owner Yes No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): Yes No
- High Unemployment Area (HUA): Yes No
- Turnover Rate: 1%
- Repeat Contractor: Yes No

FUNDING

- Requested Amount: \$49,764
- In-Kind Contribution: \$31,280

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	Mfg. Skills, Business Skills, Computer Skills, Cont. Imp., Literacy Skills	29	8-100	0	\$1,716	\$17.54
				Weighted Avg: 66			

- Reimbursement Rate: Job # 1: \$26 SB Priority
- County(ies): Los Angeles
- Occupations to be Trained: Production Staff, Administrative Staff, Manager/Supervisor, Owner
- Union Representation: Yes
 No
- Health Benefits: Job # 1: \$2.50 per hour

SUBCONTRACTORS

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

OVERVIEW

Founded in 1975 and located in Covina, Dauntless Industries, Inc. dba Dauntless Molds (Dauntless) (www.dauntlessmolds.com) is a manufacturer of molds for the plastic industry.

Dauntless has 41 years of experience in constructing high quality, low maintenance molds. The Company has grown from a custom mold manufacturer to a true one-stop solution. Dauntless uses many proprietary techniques in every aspect of construction. This includes mold design and build, turnkey production cell systems, in-house trial runs, and full plastic production molding. Its customer base includes medical, optical, bio-medical, pharmaceutical and high-tech industries.

This is Dauntless' fifth ETP Agreement, and the third in the last five years. Previous training focused on proprietary techniques, computer technology, continuous improvement and new equipment.

Due to increased demand, the Company recently invested \$80,000 in a new mold press. Training was not included in the purchase price of the new equipment; and workers must learn how to operate. Training will also focus on cross training. As a small business, trainees must learn the various aspects of manufacturing process to allow coverage when an employee is absent or when a double shift would be necessary to keep pace with customer orders.

Training Plan

Manufacturing Skills: Training will equip Production Staff with the skills needed to operate new equipment and cross-train in different manufacturing processes.

Computer Skills: Training will be provided to all occupations and focus on the Company's Manufacturing and Enterprise Resource Planning (MRP/ERP) system and Computer-Assisted Design/Computer-Aided Manufacturing (CAD/CAM)

Continuous Improvement: Training will be provided to all occupations to increase efficiency and productivity by implementing process improvements and production operations.

Business Skills: Training will be provided to Administrative Staff, Managers and Owners to ensure they have the skills to improve communication, project management and customer service.

Literacy Skills: Training will be provided to Production Staff in basic math to help improve their job skills and overall performance.

Waiver for Maximum Training Hours

Dauntless is requesting a waiver to the standard maximum training hours for Small Business from 60 to 100 hours. The Company estimates that approximately two trainees need up to 100 hours of extensive training in new equipment and processes.

Temporary to Permanent Hiring

Dauntless intends to train two workers in administration and production under the Panel guidelines for Temporary-to-Permanent program. The Company has retained these employees on a temporary basis with the intention of hiring them into full-time, permanent positions after training. According to Dauntless the average time for "converting" temporary workers into full-time permanent employment is three months. It is expected that these workers will receive employer-paid share-of-cost for healthcare premiums 30 days upon hire into full-time permanent employment.

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

Training Infrastructure

The Office Manager will oversee training and project administration. She is knowledgeable of the ETP program having participated in administering the Company's prior ETP projects. Training will be delivered by dedicated in-house experts and vendors as needed.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned
ET17-0120	Covina	07/01/16 – 06/30/18	\$95,680	\$95,680 (100%)
ET14-0227	Covina	12/13/13 – 12/12/15	\$87,204	\$87,204 (100%)

ET17-0120 - Although the term date ends on 06/30/18, all trainees completed training and retained on November 2017. The Final Closeout Invoice was approved on 03/14/18.

Exhibit B: Menu Curriculum

Class/Lab Hours

8-100

Trainees may receive any of the following:

MANUFACTURING SKILLS

- Cross-Training - Manufacturing Process
- Computer-Operated Machinery
- Computerized Numerical Control
- Equipment Operation
- Injection Mold Press
- Tool Making

CONTINUOUS IMPROVEMENT

- ISO 9001
- Leadership Skills for Frontline Workers
- Process Improvement
- Production Operations/Workflow/Scheduling

COMPUTER SKILLS

- Accounting Software
- Autodesk
- Cimatron
- Computer-Assisted Design/Computer-Aided Manufacturing
- Enterprise Resource Planning
- Manufacturing Resource Planning
- Moldflow®
- Networking
- SolidWorks
- Software Applications

BUSINESS SKILLS

- Customer Service
- Communication Skills
- Project Management

LITERACY SKILLS

- Basic Math

Literacy Skills training will not exceed 45% of total training hours per trainee.

Note: Reimbursement for retraining is capped at 100 total hours per-trainee, regardless of method of delivery.



**Retrainee - Job Creation
Training Proposal for:**

Dewell Enterprises Inc. dba Commercial Bath Refinishing

Small Business

ET18-0201

Approval Date:

ETP Regional Office: San Diego

Analyst: H. Bernard

CONTRACTOR

- Type of Industry: Construction

 - Number of Full-Time Employees
 - California: 60
 - Worldwide: 60
 - Number to be trained: 40

 - Out-of-State Competition: No OSC
 - Special Employment Training (SET): Yes No
 - High Unemployment Area (HUA): Yes No
 - Turnover Rate: 12%
 - Repeat Contractor: Yes No
- Priority Industry: Yes No
- Owner Yes No

FUNDING

- Requested Amount: \$41,600
- In-Kind Contribution: \$66,566

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 SET	Business Skills Commercial Skills Computer Skills Cont. Imp. Hazardous Materials PL - Commercial Skills	35	8 - 60	0	\$1,040	\$22.77
				Weighted Avg: 40			
2	Retrainee SB <100 SET Job Creation Initiative	Business Skills Commercial Skills Computer Skills Cont. Imp. Hazardous Materials PL - Commercial Skills	5	8 - 60	0	\$1,040	*\$14.58
				Weighted Avg: 40			

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

- Reimbursement Rate: \$26 SB Priority
- County(ies): San Diego, Orange, Los Angeles, Santa Clara, Sacramento
- Occupations to be Trained: Field Technician, Administrative Staff, Production Technicians, Owner
- Union Representation: Yes
 No
- Health Benefits: Job #2 only: Up to \$2.50 per hour

SUBCONTRACTORS

- Development Services: Training Funding Source in Seal Beach will develop this proposal for a flat fee of \$1,900.
- Administrative Services: Training Funder Source will also assist with administration of this proposal for a fee not to exceed 13% of payment earned.
- Training Vendors: Crestcom in Carlsbad will provide training in Communication Skills, Customer Service, Leadership Skills (Business Skills).

OVERVIEW

Founded in 1992 and headquartered in San Diego, Dewell Enterprises Inc. dba Commercial Bath Refinishing (Dewell) provides bathtub and countertop repair and refinishing for porcelain bathtubs, bathroom countertops, shower walls, bathroom sinks and laminate kitchen countertops. The Company primarily serves property management companies; however, it also works with residents and hotels. The Company will have seven locations participating in training: two in San Diego (including headquarters), Anaheim, Carson, Van Nuys, San Jose, and Sacramento.

Need for Training

In 2017, Dewell's revenue grew 10%. The Company also opened a new location in Van Nuys. Growth is expected to continue through 2018 due to increases in the construction industry and housing markets. The Company also has to keep up with technology to remain competitive. Designs and materials are constantly updated. As such, the Company must provide employees with necessary skills to keep up with industry changes and growth.

Additionally, the Company will be implementing standardized training across all locations for Field Technicians and Office Staff. This includes a new "Refinishing School" for Field Technicians held quarterly over two full days, Equipment Operations, Painting, Prepping & Protecting Property and Material Handling. Training will be provided by the Owner and other subject-matter experts.

Training Plan

Training under this project will focus on field technicians (both incumbents and newly hired), production technicians, administrative staff and the owner. The following skills is a summary of the curriculum training that will be delivered via classroom/laboratory setting and E-learning. The E-Learning training methodology will allow the company to train staff via virtual webinar platforms to cut costs on travel for trainers and trainees across the 7 different locations. (Exhibit B – Menu Curriculum provides full details on the training that will be delivered).

Business Skills: Customer Service Skills, Budgeting Skills, Communication Skills, and Performance Management Planning

Commercial Skills: Equipment Operations, Job Costing, Painting, and Material Handling

Computer Skills: Microsoft Office, Quick Books and Time Management

Continuous Improvement: Process & Productivity Improvement, Improved Quality Systems, and Internal Procedures.

Hazardous Materials: Handling, Communication and Properties of toxic substances.

Productive Laboratory (PL)

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 during all hours of training.

New hires will need extensive PL training since the work is unique and complicated. As such, PL training will allow Field Technicians to gain the necessary experience to work independently. Trainees will be paired with an experienced technician who will teach them proper field procedures, equipment usage and site logistics. Trainees will be exposed to many different types of work situations. The experiences will lead to increased competency and reduced

errors. During PL, production will be slowed to allow trainees to learn. The Company expects most newly hired Technicians will require 88 total hours of hands-on training; however, all trainees will be capped at 24 hours per trainee. The ratio will be 1:2 to simulate actual production as field technicians typically work in pairs.

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.

Dewell is expanding due to growth and the new location. The Company has committed to hiring five net new employees (Job Number 2) at the Carson, Van Nuys, San Jose and Orange locations. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into “net new jobs” as a condition of contract.

Training Infrastructure

Dewell’s Office Manager will oversee the ETP project and work with the Company’s Owner to schedule training and administer the project. The Company also retained Training Funding Source to assist with administration.

RECOMMENDATION

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum

Class/Lab & E-Learning Hours

8 – 60 Trainees may receive any of the following:

BUSINESS SKILLS

- Budgeting Skills
- Coaching Skills
- Communication Skill
- Conflict Management
- Customer Service
- Sales Skills/Customer Relations
- Leadership Skills
- Performance Management Planning
- Product Knowledge
- Risk Management
- Schedule Coordination

COMMERCIAL SKILLS

- Equipment Operations
- Job Costing
- Materials Handling and Storage
- Painting
- Power Tool use and Guarding
- Prepping/Protecting Property
- Respiratory Protection
- Site Logistics
- Work Zone Traffic Control

COMPUTER SKILLS

- GPS Software
- Microsoft Office
- QuickBooks
- Time Management

CONTINUOUS IMPROVEMENT

- Process Improvement
- Problem Solving/Decision making
- Productivity Improvement
- Quality Systems and Procedures
- Team Building

HAZARDOUS MATERIALS

- Hazard Communication
- Material Safety Data Sheet
- Toxic Substances

Productive Lab Hours

0 – 24

COMMERCIAL SKILLS (1:2 trainer-to-trainee ratio)

- Equipment Operations
- Field Operational Procedures
- Site Logistics

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

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery. PL is capped at 24 hours per-trainee.



**Retrainee - Job Creation
Training Proposal for:
Discount Two Way Radio Corporation**

Small Business

ET18-0213

Approval Date: April 25, 2018

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

CONTRACTOR

- Type of Industry: Wholesale Trade
 Retail
 Priority Industry: Yes No

- Number of Full-Time Employees
 California: 34
 Worldwide: 34
 Number to be trained: 39
 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: \$34,320
- In-Kind Contribution: \$71,467

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, Computer Skills, Continuous Improvement, Manufacturing Skills	34	8-60	0	\$880	\$17.54
				Weighted Avg: 40			
2	Retrainee Job Creation Initiative SB <100	Business Skills, Computer Skills, Continuous Improvement, Manufacturing Skills	5	8-60	0	\$880	*\$14.62
				Weighted Avg: 40			

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

- Reimbursement Rate: Job #'s 1 & 2: \$22 SB Non-Priority
- County(ies): Los Angeles
- Occupations to be Trained: Production Staff, Software Developer, Information Specialist, Administration Staff, Customer Service/Sales Staff, Repair Technician, Manager/Supervisor, Owner
- Union Representation: Yes
 No
- Health Benefits: Job #'s 1 & 2: \$2.50 per hour

SUBCONTRACTORS

- Development Services: DTWR hired Training Funding Source (TFS) in Seal Beach for development services for a flat fee of \$2,900.
- Administrative Services: TFS will also provide administrative services for a fee not to exceed 13% of funding earned.
- Training Vendors: N/A

OVERVIEW

Founded in 1997, and headquartered in Rancho Dominguez, Discount Two Way Radio Corporation (DTWR) (www.DTWR.com) is an RCA distributor of radio products and accessories. DTWR assembles, customizes, repairs, and distributes the following radios: digital

and economy portables, digital mobiles, waterproof radios, VHF marine radios, surveillance kits, speaker mics, headsets, and batteries. This will be DTWR's second ETP Agreement.

Training Plan

Under the prior ETP Agreement, DTWR delivered training to workers to improve employee skills and migrate from analog to digital two-way radio communications. With significant growth over the last few years, DTWR found it imperative to improve employee capabilities to meet increased productivity levels. The Company continues to transition from analog to digital radio communications, providing a powerful and more flexible platform with improved frequencies. DTWR offers digital radios with networking and control technologies that can be deployed in larger fleets that provide better operational range.

In the past year, the Company also experienced an increase in the number of people accessing its website from smartphones, making up 40% of its clientele. To provide a user-friendly experience, DTWR will provide marketing and mobile strategy training to utilize new techniques and stay updated on digital advancements. In addition, the Company will provide sales training to begin implementing a new sales model. Staff will sell products directly to end-customers via inside sales, and e-commerce/website to outside sales and channel partners. A new series of professional portable digital radios, RDR2300 and RDR4300, has been developed to meet the communication needs of DTWR channel partners. Trainees will receive product training to ensure they can operate equipment and perform maintenance on all DTWR radios.

The digital radio platform has continued to emerge with new advances in radio technology. To remain competitive, DTWR must offer more sophisticated products that appeal to customers. As a result, the Company has developed a training plan that will improve employee skills and technical knowledge for optimizing, maintaining, programming, troubleshooting, and providing repair services.

Business Skills: Training will be delivered to all occupations to improve customer service and communication skills. Training will increase staff's ability to negotiate contracts and implement effective procurements.

Computer Skills: Training will be delivered to Software Developers and Information Specialists to implement new technologies and software programs within the Company. Training topics will help staff maintain and optimize NetSuite, incorporate new techniques for securing data, and improve staff's ability to update and enhance the Company's website.

Manufacturing Skills: Training will be delivered to Production Staff and Repair Technicians to learn to assemble and repair two way radios. Training topics will include production and inventory management, marine radios, government services admin procedures, and preventive maintenance procedures.

Continuous Improvement: Training will be delivered to all occupations to eliminate inefficiencies, provide cross training, and improve services. Staff will also learn additional technical skills to provide quicker response times for customers.

➤ Training Infrastructure

The Company's Controller and Accounts Receivable Administrator will oversee administration of this training project. Both staff members were responsible for the effective administration of the prior ETP Agreement and are familiar with ETP record keeping and documentation requirements. The Company has also hired Training Funding Source to provide administration services for the entirety of the contract.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0410	Rancho Dominguez	04/19/16-04/18/18	\$46,800	\$32,918 (70%)

Under ET16-0410, DTWR faced a learning curve and struggled with ETP record keeping during the beginning of the Agreement. During this time, management also focused more on sales/marketing for DTWR, oppose to training. As a result, training did not take place for workers as originally anticipated. In addition, an issue with curriculum topics became a constant struggle with in-house instructors (rosters). For the upcoming training project, staff is well prepared and are more familiar with training and proper documentation for ETP reimbursement. The contract representatives (Controller and A/R Administrator) plan on meeting with in-house instructors more frequently throughout the duration of the Agreement to ensure ETP rosters are completed correctly, and will also schedule training on a consistent basis.

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

8-60

Trainees may receive any of the following:

BUSINESS SKILLS

- Customer Relations
- Marketing, Expos
- Interpersonal Communications
- Leadership
- Negotiation
- Sales & Service
- Social Media
- Teamwork
- Technical Writing
- Warehouse Logistic & Inventory

COMPUTER SKILLS

- Adobe Creative Suite
- Microsoft Office
- NetSuite
- Mailchimp
- Valogix Inventory

CONTINUOUS IMPROVEMENT

- Reporting & Performance Goals
- Productivity Improvement

MANUFACTURING SKILLS

- Assembly & Repair
- Batteries
- Digital Portable and Mobiles
- Government Services Admin Procedures
- Equipment Operation & Maintenance
- Headsets
- Industry Solutions
- IP67 (Submersible rating for Radios), waterproof, (6 means Water, 7 means proof up to 1 meter in water)
- P25 Compliance Assessment Program
- Pick, Pack, Ship
- Preventive Maintenance Procedures
- Production & Inventory Management
- Product/Service Knowledge
- Portable Radios
- Public Safety Two Way Radios
- Radio Chargers and Accessories

- Speaker Mikes
- Surveillance Kits
- Troubleshooting
- Very High Frequency (VHF) Marine Radios

Note: Reimbursement for retraining is capped at 120 total training hours per trainee, regardless of the method of delivery.



**TRAINING PROPOSAL FOR
GPL Solutions LLC
17-0947**

Panel Meeting Date: 05/24/2018
Delegation Order Date: 03/14/2018
Regional Office: North Hollywood Regional Office
Analyst Name: Elsa Wadzinski
Type of Proposal: Single Employer (SB), Small Business Program
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 40,560.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 40,560.00	N/A	\$ 0.00	\$ 45,000.00

APPLICANT PROFILE

Company Summary	GPL Solutions LLC (GPL) (www.gpltech.com) is a full-service technology solutions firm focused solely on solving production Information Technology (IT) challenges of the Media and Entertainment industry. The Company also provides engineering services, hardware, software, systems and storage for post-production facilities and the Department of Defense.
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Industry Sector(s)	Professional, Scientific, and Technical
Priority Industry	Yes
No. Employees (Applicant)	State: 25 US: 29 World Wide: 29
Turnover Rate (Applicant)	8.00 %
Repeat Contractor	No

High Unemployment Area	No
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	GPL needs to elevate employee skill sets to keep up with top-of-the-line technology, products, and services.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	22	\$ 26.00	60	\$ 1560	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	4	\$ 26.00	60	\$ 1560	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

GPL, founded in 2003 and headquartered in Burbank, designs IT solutions and data infrastructures to meet the unique needs of post-production facilities (in the entertainment industry), visual effects shops, feature film studios, and game development houses. GPL's target market includes the entertainment industry, the government, and manufacturers. Current clients include: Sony, Sony PlayStation, Animal Logic, Fuse Effects, Deluxe and Premiere Digital.

2. Current Training Project Details

Purpose of Training	<p>The IT business is extremely competitive. To remain a viable competitor in the industry, employees must be knowledgeable and proficient in the newest and most current technology available. Additionally, the Company must improve processes to cut costs and increase client base. Training will include customer service, negotiating, sales, Customer Relations Management (CRM), procurement, and purchasing.</p> <p>Additionally, GPL must train workers on client-specific training requirements (Invidia, Dell, EMC and VMWARE). Each company requires GPL trainees to be trained 20-40 hours.</p>
Training Infrastructure and Administrative Plan	<p>ETP funds will not displace the Company's commitment to training. The Company spends over \$125,000 annually on training. The Company has created a training plan and is ready to train once the proposal is approved.</p> <p>GPL's Human Resources Administrator will be the internal lead for the ETP project and has assigned another person from GPL to assist with scheduling and overseeing training. GPL has also retained a subcontractor, Judith's Training Services, to assist with administration of this Contract.</p>
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations may receive Business Skills, Commercial Skills, Computer Skills and Continuous Improvement training, as detailed in the Curriculum.	

PROPOSED TRAINING PROJECT DETAILS

4. Additional Company or Training Project Details

Retrainee-Job Creation

GPL's expanded products and services has increased its client base. The Company is expanding business capacity by hiring new employees to support growth. GPL has committed to hiring four employees (Group 2).

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

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Judiths Training Services	Los Angeles	\$ 4,250.00
Administrative	Judiths Training Services	Los Angeles	Not to exceed 10.00% of earned funds
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	Planned Course Offerings
Business Skills	Accounting
	Administration
	Business Administration
	Business Planning
	Business report writing and editing
	Coaching Procedures
	Conflict Management
	CRM Customer Relations Management
	Customer Relations
	Decision making
	Evaluations
	Financial Strategy
	Interpersonal Skills
	Leadership
	Marketing
	Merchandising
	Monitoring
	Motivation
	Negotiating
	Networking
	Payroll
	Procurement
	Product Knowledge
	Purchasing
	Sales (Dell products Palaton/Icalon)
	Strategic Planning
Team Building	
Telephone Skills	
TRAIN-THE-TRAINER	
Vendor Relations	
Commercial Skills (Standard)	creation or assembly
	cross training
	Engineering/Architectural
	equipment operation
	inventory control
	project operation
	Telecommunications
	warehousing
Computer Skills (Standard)	Animation

Attachment 2 - Training Delivery and Curriculum Listing

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

	Certified Novell Assistance (CAN)
	Designing and developing software and applications
	Film and Video
	InformationSystems Security Training
	Invidia (graphics)
	Local Area Networks (LAN)
	Metropolitan (MAN)
	Microsoft Office 365
	Multimedia
	Network Management
	Post Production
	Training in certain software applications
	Virtualization training (software/hardware)
	Wide (WAN)
	World Wide Web (WWW)
Continuous Improvement Skills	Active directory (Software)
	Decision Making
	Dell (Hardware)
	EMC (Hardware)
	Engineer Management
	ISO 9000- 9005
	IT Development
	Nas-San (Hardware)
	Problem Solving
	Process Improvement
	Project operation/workflow
	Project scheduling
	Strategic Planning, Evaluations, Monitoring
	Team Building
	Vendor training (Hardware)



**Retrainee - Job Creation
Training Proposal for:
GS Williams, Inc. dba Archoustics West**

Small Business

ET18-0196

Approval Date: March 12, 2018

ETP Regional Office: Sacramento

Analyst: D. Jordan

CONTRACTOR

- Type of Industry: Engineering Services
Priority Industry: Yes No
- Number of Full-Time Employees
California: 16
Worldwide: 17
Number to be trained: 21
Owner Yes No
- Out-of-State Competition: Competitors Outside CA
- Special Employment Training (SET): Yes No
- High Unemployment Area (HUA): Yes No
- Turnover Rate: 5%
- Repeat Contractor: Yes No

FUNDING

- Requested Amount: \$32,760
- In-Kind Contribution: \$43,000

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 Priority Rate	Business Skills, Comm'l Skills, Computer Skills, Cont. Imp., Literacy Skills, Mgmt. Skills, OSHA 10/30, PL-Comm'l Skills	16	8-60	0	\$1,560	\$16.70
				Weighted Avg: 60			
2	Retrainee Job Creation SB <100 Priority Rate	Business Skills, Comm'l Skills, Computer Skills, Cont. Imp., Literacy Skills, Mgmt. Skills, OSHA 10/30, PL-Comm'l Skills	5	8-60	0	\$1,560	*\$13.66
				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): Placer
- Occupations to be Trained: Accounting Staff, CAD Design Staff, Installer, Owner, Project Manager, Sales Staff, Warehouse Staff
- Union Representation: Yes
 No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: Sierra Consulting Services in El Dorado Hills assisted with development for a flat fee of \$3,200.
- Administrative Services: Sierra Consulting Services will also perform administrative services for a fee not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

OVERVIEW

Founded in 1998 and headquartered in Rocklin, GS Williams, Inc. dba Archoustics West (GS Williams) (www.logison.com/distributor/archoustics-west) is a family-owned and operated business that specializes in sound masking, paging, music, acoustical and white noise system. The Company designs, installs, tunes and programs the LogiSon Acoustic Network, a sound masking system that increases speech privacy and reduces noise disruption. The Company is the leading west coast sound masking provider for California, Arizona, Nevada, New Mexico and Hawaii. GS Williams customers include corporations, hotels, colleges and hospitals. The Company's location in Rocklin will be the only facility that will participate in ETP training.

Need for Training

This is GS Williams first ETP project. To remain competitive, the Company is implementing several new programs to improve efficiency and overall productivity. The Company recently invested in a new CAD program, AutoCAD, to help staff become efficient in drawing schematics and making easier and faster revisions. In addition, GS Williams will provide training on its new custom data base from Salesforce, which will act more as a ERP software program to track prospects, new clients, inventory, project quotes, sales and work orders.

Furthermore, the Company's training plan will focus on product marketing, customer service, and business management. Courses such as Product Knowledge, Customer Relationship Management and Marketing/Sales Techniques will provide trainees the skills needed to ensure customer satisfaction.

Retrainee – Job Creation

Since 2003, GS Williams has grown from \$250k in sales to over \$5 million in 2017. Additionally, the new Health Insurance Portability and Accountability Act (HIPAA) and Hospital Consumer Assessment of Healthcare Providers and Systems (HCAHPS) requirements have led to an increase in demand for GS Williams products among hospitals and medical offices, and the need to expand business capacity by hiring new workers.

The Company has committed to hiring five new employees (Job Number 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

Training Plan

Training will be delivered via Class/Lab, Videoconference, E-Learning and Productive Lab in the following:

Business Skills: Training will be offered to all occupations and focus on business fundamentals, marketing and sales techniques, project management and methodology.

Literacy Skills: Training will be offered to Installers, Project Managers, Warehouse and CAD Design Staff. Training will focus on vocational English as a second language and basic math.

Commercial Skills: Training will be offered to all occupations except Accounting Staff. Training will focus on assembly procedures, cross-training in production equipment, troubleshooting and work order processing.

Management Skills: Training will be offered to the Owner and Project Managers and focus on decision making, supervisor skills and teambuilding.

Computer Skills: Training will be offered to all occupations and focus on Autodesk/AutoCAD, Intermediate and Advanced Microsoft Office and Salesforce.

Continuous Improvement: Training will be offered to all occupations and focus on process improvement, quality measurement systems, systems failure analysis, and production operations and workflow.

OSHA 10/30: This training is a series of courses “bundled” by industry sector and occupation. Its consists of 10 hours of classroom or CBT training for journey-level workers and 30 hours of 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. Installers, Project Managers and Warehouse Staff will receive OSHA 10/30 training.

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. An experienced Technician will be dedicated to training delivery during all hours of training.

GS Williams request up to 24 hours PL-Commercial Skills training for Installers and Warehouse staff. PL training is needed to expose staff to a variety of work environments and project sounds. This training will ensure that staff can install products in different settings and test for sound accuracy.

When staff works on a project that has multiple floors, the set-up required is complex and completely different. With multiple floors, a project requires different hardware and process for programming. Therefore, due to job complexity, GS Williams is requesting a 1:2 trainer-to-trainee ratio.

Trainees will work with a trainer who will explain and demonstrate step by step instructions and observe while trainees perform these same tasks. Production will be affected because an experienced technician will be used to train and observe trainees. Additionally, turnaround time will suffer while trainees become familiar with the various components of the equipment.

Commitment to Training

GS Williams allocates approximately \$20,000 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

GS Williams has a detailed training plan in place and is ready to begin training upon approval. The President will oversee this training project. In addition, the Company has retained the services of a third-party administrative subcontractor to assist with administration. Training will be delivered by in-house experts.

RECOMMENDATION

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum**Class/Lab/E-Learning/Videoconference Hours**

8 - 60

Trainees may receive any of the following:

BUSINESS SKILLS

- Behavior Style Strategies
- Business Communication
- Business Fundamentals
- Business Writing
- Communication Styles
- Conflict Resolution
- Cost Control
- Creative Marketing
- Customer Relationship Management
- Customer Service
- Dealing with Difficult People
- Employee Coaching
- Essential Skills for New Supervisor
- Financial Analysis
- Good Client Relations
- Interpersonal Communications
- Leadership
- Marketing/Sales Techniques
- Negotiating
- Operational Skills
- Planning and Organization
- Product Knowledge
- Project Management and Methodology
- Project Requirements Analysis and Specifications
- Property and Resource Management Skills
- Relationship Building
- Retaining Customers
- Strategic Planning
- Time Management

COMMERCIAL SKILLS

- Acoustical Definitions
- Acoustical Installation
- Assembly Procedures
- Assembly Process Control
- Blue Print Reading and Schematics
- Cross-Training in Production Equipment/Skills
- Electrical and Electronics
- Equipment Operation
- Inventory Control
- Ladder and Equipment Safety
- Music Set-Up, Options
- Paging Set-Up, Options

- Troubleshooting
- Use of a Sound Meter
- Warehousing
- Work Order Processing

COMPUTER SKILLS

- Autodesk/AutoCAD
- Financial Management System
- Microsoft Office Suite
- Salesforce

CONTINUOUS IMPROVEMENT

- Change Management
- Communication Skills
- Creating a Quality Organization
- Cross-Training
- Decision Making
- How to Coach and Mentor
- Kaizen
- Leadership
- Meeting Management
- Problem Solving and Decision Making
- Process Capability
- Process Improvement
- Production Operations/Workflow
- Production Scheduling
- Project Management
- Quality Measurement Systems
- Root Cause Analysis
- Systems Failure Analysis
- Team Building
- Teamwork Development Skills
- Time Management
- Visual Controls

LITERACY SKILLS

- Vocational English as a Second Language
- Vocational English
- Basic Math

MANAGEMENT SKILLS (Managers/Supervisors Only)

- Administration
- Coaching Procedures
- Decision Making
- Effective Meetings for Leaders
- Finance for Technical Managers
- Leadership
- Motivation
- Supervisor Skills
- Teambuilding

OSHA 10/30 (OSHA Certified Instructor)

- OSHA 10 (Must complete full 10-hour course)
- OSHA 30 (Must complete full 30-hour course)

PL Hours

0 - 24

COMMERCIAL SKILLS (Ratio 1:2)

- Acoustical Installation
- Assembly Procedures
- Assembly Process Control
- Blue Print Reading and Schematics
- Cross-Training in Production Equipment/Skills
- Electrical and Electronics
- Equipment Operation
- Ladder and Equipment Safety
- Music Set-Up, Options
- Paging Set-Up, Options
- Troubleshooting
- Use of a Sound Meter
- Work Order Processing

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 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:
H & A Transmissions, Inc.**

Small Business

ET18-0236

Approval Date: May 9, 2018

ETP Regional Office: San Diego

Analyst: M. Ibarra

CONTRACTOR

- Type of Industry: Manufacturing

 - Number of Full-Time Employees
 - California: 64
 - Worldwide: 65
 - Number to be trained: 25

 - Out-of-State Competition: NAICS Code Eligible
 - Special Employment Training (SET): Yes No
 - High Unemployment Area (HUA): Yes No
 - Turnover Rate: 11%
 - Repeat Contractor: Yes No
- Priority Industry: Yes No
- Owner Yes No

FUNDING

- Requested Amount: \$26,000
- In-Kind Contribution: \$20,000

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 Priority Rate	Computer Skills, Manufacturing Skills, PL-Mfg Skills	25	8 - 60	0	\$1,040	*\$16.70
				Weighted Avg: 40			

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

- Reimbursement Rate: \$26 SB Priority
- County(ies): San Bernardino
- Occupations to be Trained: Administrative Support, Assembler, Manager
- Union Representation: Yes
 No
- Health Benefits: Up to \$2.50 per hour

SUBCONTRACTORS

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

OVERVIEW

Located in Rancho Cucamonga and formed in 1992, H & A Transmissions, Inc. (H & A) (www.hnatrans.com) started as a transmission remanufacturer for Honda and Acura automobiles. The Company incorporated in 1997 and is now a wholesale remanufacturer of Honda and Acura transmissions to large auto parts distributors, dealerships, transmission shops, general automotive repair shops, and warranty companies.

Need for Training

Changing government standards on fuel efficiency requires the auto industry to improve the average fuel economy of cars and light trucks produced for sale in the US. Vehicles in the marketplace have gone from four- and five-speed transmissions to six-speed manual transmissions and nine- and ten-speed automatic transmissions to address fuel efficiency regulations. Training in this proposal will heavily focus on providing assemblers the skills to learn the increasingly difficult transmission models, specifically, the mechanical and electrical areas of transmission remanufacturing. Training will provide employees with critical manufacturing skills to support existing products and stay ahead of increasingly complex products.

Training is also driven by the Company's investment on a new Enterprise Resource Planning (ERP) system. Training will allow employees to learn and use the new system to streamline business process management including automation, workflow, and document management.

Training Plan

Computer Skills – Course topics are specific to the new ERP system including order entry and billing, production, shop floor control, job scheduling, purchase order and inventory control, estimating, and routing creation.

Manufacturing Skills – Training topics include new transmission applications, external and internal part identification and functionality, unit preparation and assembly, valve body and clutch pack specifications, and external and internal electronics functionality and purpose.

Productive Laboratory (PL)

Trainees may produce goods for profit as part of PL training, in the courses identified under the Curriculum. H & A will provide PL training in Manufacturing Skills topics such as new transmission applications, external and internal part identification and functionality, unit preparation and assembly, valve body and clutch pack specifications, and external and internal electronics functionality and purpose. Training will ensure Assemblers have a broader understanding of the entire transmission remanufacturing process. PL will be delivered with a 1:1 trainer-to-trainee ratio. Trainees may receive 24 hours of PL training.

Trainers will be qualified and/or certified to instruct and deliver the course content and material. Trainers will direct operations and instructions and providing immediate feedback while work is performed. Trainers will be dedicated to training delivery during all hours of training.

Training Infrastructure

The Company's Vice President of Operations will oversee project implementation and overall administration. Internal administrative staff will assist in scheduling training and collecting completed attendance rosters for uploading in the ETP Online Systems.

Training will be conducted by in-house subject-matter experts and vendors (if needed). The Company is ready to begin training upon contract approval.

Professional Employer Organization (PEO)

The Company uses TriNet passport Services, a PEO, for HR services.

RECOMMENDATION

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 60 Trainees may receive any of the following:

COMPUTER SKILLS

- Order Entry and Billing (Macola System)
- Production, Shop Floor Control, Job Scheduling (Macola System)
- Purchase Order and Inventory Control (Macola System)
- Estimating, BOM, & Routing Creation (Macola System)
- Warranty Tracking and Resolution

MANUFACTURING SKILLS

- New Transmission Applications
- External Part Identification and Functionality
- Internal Part Identification and Functionality
- Unit Preparation and Assembly
- Valve Body and Clutch Pack Specifications
- External and Internal Electronics Functionality and Purpose

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

PL Hours

0-24

MANUFACTURING SKILLS (1:1 ratio)

- New Transmission Applications
- External Part Identification and Functionality
- Internal Part Identification and Functionality
- Unit Preparation and Assembly
- Valve Body and Clutch Pack Specifications
- External and Internal Electronics Functionality and Purpose

Note: Reimbursement for retraining is capped at 60 total hours, per trainee, regardless of method of delivery.
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**Training Proposal for:
InspecTesting, Inc.**

Small Business

ET18-0200

Approval Date:

ETP Regional Office: San Diego

Analyst: M. Ibarra

CONTRACTOR

- Type of Industry: Services
Technology/Other
Priority Industry: Yes No
- Number of Full-Time Employees
California: 36
Worldwide: 48
Number to be trained: 31
Owner Yes No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): Yes No
- High Unemployment Area (HUA): Yes No
- Turnover Rate: 7%
- Repeat Contractor: Yes No

FUNDING

- Requested Amount: \$44,330
- In-Kind Contribution: \$51,248

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, Cont. Improv., OSHA 10/30, PL - Commercial Skills	31	8 - 200	0	\$1,430	\$17.03
				Weighted Avg: 55			

- Reimbursement Rate: Job #1: \$26 SB Priority
- County(ies): San Diego
- Occupations to be Trained: Administrative Support Staff, Inspector, and Supervisor/Manager
- Union Representation: Yes
 No
- Health Benefits: Job #1: \$0.83 per hour

SUBCONTRACTORS

- Development Services: Bright Training Solutions (BTS) in Menifee will develop the project for a flat fee of \$3,000.
- Administrative Services: BTS will also assist with administrative services for a fee not to exceed 10% of earned funds.
- Training Vendors: To Be Determined

OVERVIEW

Founded in 1996, and headquartered in National City, InspecTesting, Inc. (InspecTesting) (www.inspectesting.com) is a minority-owned small business that provides nondestructive and destructive testing as well as inspection analysis for both public and private organizations in the construction, fabrication, manufacturing, and maritime industries. Nondestructive testing uses a wide range of measurement analysis techniques to evaluate the properties of materials, components and/or systems, such as piping and structure of military ships as well as commercial piping and building structures, without causing permanent damage or deformation. In contrast, destructive testing determines service life and detects design weaknesses by prolonged endurance tests under the most severe operating conditions, continued until the product fails.

The Company also offers Welder Performance Qualification (WPQ) testing, Welding Procedure Specification (WPS) development, Procedure Qualification Record (PQR) maintenance, and Level III Auditing services to ensure compliance with customer requirements. InspecTesting's customer base includes ship repair and ship building companies such as BAE Systems San Diego Ship Repair, General Dynamics NASSCO, and Continental Maritime; as well as public entities such as Legoland, SeaWorld San Diego, San Diego Gas & Electric (SDG&E), General Atomics, San Diego Zoological Society, and Qualcomm.

This will be the third Agreement between InspecTesting and ETP, the third in the last five years. During its prior projects, InspecTesting experienced unprecedented growth, opening a new facility in Norfolk, Virginia (2014) and in Vallejo California (2016). Training in the previous Agreements provided workers the skills to meet high level of quality assurance and adaptability to support growth and meet industry and individual customer requirements. The proposed training plan will target workers at the San Diego location only.

InspecTesting's customer base is primarily composed of Navy contractors supporting the US military. In the past, the Navy awarded cost-plus contracts to its subcontractors, allowing subcontractors to exceed contract amounts with justification. Last year, the Navy changed its contracting model to fixed-price contracts. This impacts subcontractors, maximizing risk and responsibility for all costs, regardless of profit. The Navy's new contracting structure necessitates InspecTesting streamline its business processes to reduce waste and keep production costs low.

To address the change in customer requirements and facilitate its business goals, InspecTesting will establish company standards and expectations related to work process efficiency and employee job competency. The Company plans to utilize Key Performance Indicators to measure performance and make necessary adjustments/improvements and evaluate the overall success of the Organization.

In this proposal, InspecTesting will continue to provide extensive Inspection Skills to Inspectors and Quality Systems and Procedures training to its entire workforce. Comprehensive leadership and critical thinking skills will be provided to top-level staff and the management team to implement new and improve existing business processes.

ETP funding will assist the Company in providing its workers with a high degree of complex and technical knowledge and skills necessary to meet customer demands.

Training Plan

In this proposal, some curriculum topics are repeated from the prior agreements; however, the subject matter has been updated. There will be no duplication of training from prior contracts. All training will occur at the National City location.

The following skills training will be delivered via the following Class/Lab and Productive Laboratory:

Business Skills – Training will be offered to all trainees. Leadership skills training will allow lead staff and Supervisors/Managers to develop leadership and team skills to effectively communicate and implement change. Training topics include Key Performance Indicators, Estimating, Job Costing, Budgeting, Job Reporting, and Communication Skills.

Commercial Skills – Training will be offered to Inspectors and Supervisors/Managers. Training will focus on the science of digital radiography, eddy current, ground penetrating radar, liquid penetrant, and ultrasonic. Inspection/Testing Skills training will provide Inspectors the skills to

strengthen employee advancement opportunities and meet increased industry and customer demands.

Computer Skills – Training will be offered to all trainees. Training topics include Microsoft Office, MIS Systems, Computer Radiology, and AutoCAD.

Continuous Improvement – Training will be offered to all trainees. Course topics include Quality Systems (ISO9001), Teambuilding, and Train-the-Trainer Skills.

Certified Safety Training

OSHA 10/30 – This training is a series of courses “bundled” by industry sector and occupation. It consists of 10 hours of classroom training for entry level workers and 30 hours for journey-level workers, supervisors/managers, and owners. Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

Productive Laboratory (PL) – Commercial Skills

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

InspecTesting will provide PL training for newer Inspectors in Commercial Skills, specifically, course topics in Inspection Skills such as Digital Radiography and Eddy Current Skills. Trainees may receive all their training hours in PL-Commercial Skills (up to 16 hours) or a combination of class/lab including PL hours. Training will be specific to the type of equipment and/or process to ensure trainees receive a broader understanding of the entire inspection/testing process.

The trainer-to-trainee ratio for PL will be 1:1. The Company anticipates production will be reduced during PL to focus on product quality. Trainees will acquire the skills to become competent in the operation of equipment without the pressure of normal production requirements.

Training Infrastructure

InspecTesting will utilize an administrative subcontractor. The Company’s Vice President and Controller will oversee project implementation and administration. Administrative staff will schedule training and submit a copy of completed attendance rosters to the third-party administrative subcontractor for uploading in the ETP Online Systems.

Training will be conducted by in-house subject-matter experts and vendors. The Company is ready to begin training at contract approval.

Modifications

Increase in Range of Hours

In its previous projects, the Panel funded up to 200 hours for inspectors. In the second Agreement, InspecTesting provided between 9 and 98 training hours for 29 trainees who completed retention.

The Company is again requesting to increase the maximum hours from 60 to 200. Training will focus on Inspectors. Newly-hired Inspectors need a minimum of 80 hours of training during the

first two weeks of employment, followed by an additional 22 hours of on-the-job training to reach Inspector 1. Moving to occupation Inspector 2 requires 80-102 hours. In addition, trainees need advanced skills training in various Commercial Skills training topics which may lead to obtaining a Certified Welding Inspector certification through the American Welding Society. This certification will enable Inspectors to work on government public works projects. The proposed weighted average hours is consistent with the trainee performance in the prior Agreement.

Contract Term

InspecTesting requests a two year term to accommodate Inspectors to reach required proficiency levels.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0312	National City and Vallejo	12/31/15 – 12/30/17	\$40,768	\$40,768 (100%)*
ET13-0354	National City	4/8/13 – 4/7/15	\$76,960	\$42,172 (55%)**

***ET16-0312:** The last day of ETP training was 9/27/17. InspecTesting documented 1,634 eligible training hours to equal more than 100% of the agreement amount (\$40,768) in earnings for 29 trainees who completed retention. The final invoice closeout was submitted on 12/28/17 and is currently being processed by ETP.

****ET13-0354:** The last day of ETP training was 12/17/14. InspecTesting documented 1,622 eligible training hours to equal \$42,172 in earnings for 27 trainees who completed retention.

Performance was impacted with the Norfolk, Virginia location. The Company’s moved workforce resources from San Diego to Norfolk to support the initial start-up of the new location. The remaining Inspectors in the San Diego location were working substantial overtime to meet increased customer demands. Consequently, trainees were unable to participate in some of the training.

Also, trainers did not properly document training. As such, the Company achieved lower than expected training performance.

Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 200 Trainees may receive any of the following:

BUSINESS SKILLS

- Key Performance Indicators
- Estimating Skills
- Job Costing Skills
- Budgeting Skills
- Basic Finance and Accounting Skills
- Job Reporting
- Leadership Skills (Future Managers)
 - Defining Leadership
 - Coaching and Counseling
 - Accountability
 - Business Writing
 - Leading Change
 - Empowerment
- Advanced Leadership Skills (Current Managers)
 - Motivation
 - Managing Meetings
 - Delegation
 - Critical Thinking
 - Lean Systems
 - Managing by Metrics (Key Performance Indicators)
 - Planning and Organizing
- Communication
 - Listening
 - Questioning
 - Clarifying
 - Non-Defensive Communication
 - Candor
- Advanced Communication
 - Giving and Receiving Feedback
 - Persuasion Skills

COMMERCIAL SKILLS

- Digital Radiography
- Fit Up Skills
- Eddy Current Skills
- Inspection/Testing Skills
- Ground Penetrating Radar I & II
- Liquid Penetrant I & II
- Ultrasonic – Phased Array
- Ultrasonic – Time of Flight Diffraction
- Visual Inspection I & II
- Destructive Skills

COMPUTER SKILLS

- Computer Radiology
- Microsoft Office
 - Word
 - Excel
 - Outlook
 - Powerpoint
 - Access
- Inspects MIS Systems
- Security Software
- AutoCAD (Computer-Aided Design)

CONTINUOUS IMPROVEMENT

- Quality Systems (ISO 9001)
- Team Building
- Train-The-Trainer

OSHA 10 (Certified OSHA Instructor)

- OSHA 10 (requires 10 hours completion)

OSHA 30 (Certified OSHA Instructor)

- OSHA 30 (requires 30 hours completion)

Productive Lab Hours

0 – 16

COMMERCIAL SKILLS (1:1 ratio)

- Inspection Skills
 - Digital Radiography
 - Eddy Current Skills
 - Inspection/Testing Skills

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

J & J Processing, Inc.

18-0643

Panel Meeting Date: 05/24/2018

Delegation Order Date: 05/07/2018

Regional Office: North Hollywood Regional Office

Analyst Name: Elsa Wadzinski

Type of Proposal: Single Employer (SB), Small Business Program

Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 49,920.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 49,920.00	N/A	\$ 0.00	\$ 78,500.00

APPLICANT PROFILE

Company Summary	<p>J & J Processing, Inc. dba Custom Foods (Custom Foods) (www.custom-foods.com) produces high quality dry food products. The Company offers over 2,000 dry mix formulations to develop products to meet customer needs. The Company offers a wide variety of National Brand equivalent products and custom formulations for bakery mixes, iced tea and flavored drink mixes, batters, and spice and seasoning blends. Customers include retail stores, food service and industrial customer's private labels, controlled labels and custom proprietary products. Custom Foods is an Orthodox Union (OU) Kosher manufacturing facility, Organic Certified facility and a Licensed Milk Products Dairy plant.</p>
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Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 80	US: 80	World Wide: 80
Turnover Rate (Applicant)	10.00 %		
Repeat Contractor	No		
High Unemployment Area	Yes		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Training is required to provide skills to improve food processing production by implementing Lean processing procedures, Good Manufacturing Practices (GMP) and equipment operations. Custom Foods is also finalizing the purchase of two companies that will add 5 newly created positions which will require training. Training will also focus on meeting the demands of the industry and customer expectations.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	75	\$ 26.00	24	\$ 624	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	5	\$ 26.00	24	\$ 624	8 - 60

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 1968, and headquartered in Santa Fe Springs, Custom Foods is a formulator, manufacturer, processor and packer of Branded, private label and custom packaged dry blended food products and ingredients. The Company's business consists of developing custom formulations and purchasing various types of flour, sweeteners, dry dairy products and other ingredients; blending them into powdered mixes for waffles, pancakes, breads and muffins, ice cream mixes, sugar based drink mixes and various dry seasoning products. The mixes are packaged in bulk for food service or retail packages depending on the type of customer.

Customers include wholesale distributors that sell dry mixes under a Brand name, large and small retail food markets and restaurant chains, specialty shops that carry baking and drink mixes under Brand names exclusive to their stores, as well as, large National Brand companies and warehouse store operators.

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

Custom Foods is completing the Global Food Safety Initiative Certification. This Certification is globally recognized and covers proper GMP's, food safety, plant safety, plant defense and recall controls. This certification is being required by most major customers and retail accounts, in the United States and overseas, and is required for business in the food manufacturing industry. In addition, Custom Foods is becoming Hazard Analysis and Critical Control Point accredited, Gluten Free Certified, Circle U Kosher (Orthodox Union) certified, and Organic certified. In order to grow the Company, Custom Foods needs to maintain these certifications, which will require continuous training for employees at all levels. Some of the training will include equipment operations and maintenance, food safety, allergens, food preparation, sanitation, pest control, recalls, non-conformance and chemical titration.

The Company is also committed to implementing clean, green technology in its operations. This includes recycling plastic waste, wood and paper wastes (cardboard, packaging, pallets, etc.), resale of production food wastes as a feed byproduct, lighting and lighting controls upgrades to reduce energy consumption and the implementation of upgraded air compressor controls, plumbing, and compressed air usage to reduce energy consumption.

Custom Foods believes in promoting from within the Company when possible. Training in communications, teambuilding, project management and leadership will be offered to provide staff with additional skills needed to

PROPOSED TRAINING PROJECT DETAILS

	<p>be successful in these new positions.</p> <p>The Company’s annual training budget is \$78,000. Company-funded training includes basic job skills training, new employee orientation, on-the-job training, and introductory computer skills. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.</p>
Training Infrastructure and Administrative Plan	<p>Custom Foods’ Owner and Controller will be the internal leads for this ETP project and will insure that training is scheduled per their training plan and that training is documented per ETP requirements. Although they are the leads for this project, they may choose to delegate some tasks to other Company employees. Custom Foods has also retained Training Funding Source (TFS) to assist with the administration of this Contract. TFS will enroll trainees and provide the Contractor with reports updating them on training status to help keep them on track with their training plan.</p>
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
<p>All occupations will receive Business Skills, Computer Skills, Continuous Improvement and Manufacturing Skills training. Hazardous Materials training will only be provided to Production staff (Attachment 2).</p>	

4. Additional Company or Training Project Details

Retrainee-Job Creation

Custom Foods is finalizing the purchase of two companies which will add 5 new employees, in newly created positions. These trainees will require training on Custom Foods work procedures, processes and equipment to help them transition the Company. The date-of-hire for these trainees will be within the three-month period prior to Panel approval or within the term-of-contract. These trainees will be hired into “net new jobs” as a condition of contract.

PROPOSED TRAINING PROJECT DETAILS

4.1 Program Waivers

No waivers have been applied to this proposed project.

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Training Funding Source	Seal Beach	\$ 2,900.00
Administrative	Training Funding Source	Seal Beach	13.00% of funds earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Business and Phone Etiquette
	Change Management
	Coaching and Conflict Resolution
	Communication skills
	Performance Management
	Problem Solving – root cause analysis
	Product/Service Knowledge
	Project Management
	Working Successfully with Others
	Workplace processes/procedures
Computer Skills (Standard)	Database Administrator Skills (includes developm
	Financial/Accounting/Manufacturing
	Materials Requirement (MRP)
	Microsoft Office
	Process mapping
Continuous Improvement Skills	5S Program (Sort, Set, Shine, Standardize, Sustain)
	Decision Making/Problem Solving
	Kaizen (team participation)
	Kanban Inventory System
	Leadership
	Lean Manufacturing
	Lean Waste Reduction (The 7 Wastes)
	Line Balancing
	Quality Systems
	SMED (Single Minute Exchange of Dies)
	Teambuilding
	TPM (Total Preventive Maintenance)
	Work Procedures
Hazardous Materials Skills	Haz Mat handling
Manufacturing Skills (ME) (Standard)	Good Manufacturing Practices
	HACCP (Hazard Analysis & Critical Control Point)
	Production Equipment/Tools (Preventative Mainten
	Sanitation procedures/materials
	Shop floor data collection
	Standard Operating Procedures
	Energy Efficiency
	Recycling Waste

DELEGATION ORDER



**Retrainee - Job Creation
Training Proposal for:
Luminit LLC**

Small Business

ET18-0218

Approval Date: May 8, 2018

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

CONTRACTOR

- Type of Industry: Manufacturing
Priority Industry: Yes No
- Number of Full-Time Employees
California: 79
Worldwide: 80
Number to be trained: 81
Owner Yes No
- 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

FUNDING

- Requested Amount: \$49,816
- In-Kind Contribution: \$55,656

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, Continuous Imp, Mfg. Skills	74	8-60	0	\$624	\$17.54
				Weighted Avg: 24			
2	Retrainee SB <100 Job Creation Priority Rate	Business Skills, Computer Skills, Continuous Imp, Mfg. Skills	7	8-60	0	\$520	*\$14.62
				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.

- Reimbursement Rate: Job #s 1 & 2: \$26 SB Priority
- County(ies): Los Angeles
- Occupations to be Trained: Administration/Sales Staff, Engineering Staff, Production Staff, Supervisor/Manager, Research & Development Staff
- Union Representation: Yes
 No
- Health Benefits: Job #'s 1 & 2: \$2.50 per hour

SUBCONTRACTORS

- Development Services: Training Funding Source in Seal Beach assisted with development for a flat fee of \$2,900.
- Administrative Services: Training Funding Source will also provide administrative services for a fee not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

OVERVIEW

Founded in 2005 and located in Torrance, Luminit LLC (Luminit) manufactures light shaping diffusers and related products such as edge-lit uniformity tape, glare control panels, and heads up display screens. The Company has expanded its product offering over the years to include computer generated holograms, transparent hologram components, and crystal projection screens. Luminit provides light shaping solutions for general lighting, aerospace, automotive,

instrumentation, and medical device industries. Training will take place at the Company's location in Torrance.

PROJECT DETAILS

As a manufacturer of high volume, less critical home and commercial lighting applications, Luminit is facing increasing competition from low cost suppliers from Asia using alternate, cheaper technologies. In response to this challenge, Luminit is working to improve operational efficiencies by reducing production costs and defects; improve on-time deliveries; and increase overall customer satisfaction. To achieve these goals, the Company will investment in quality systems, facilities, ERP system, and employees skills training over the next two years.

Additionally, Luminit intends to seize upon burgeoning new business opportunities in consumer electronics, high-end display applications, and innovative automotive and aerospace technology. The Company will increase investments in research and development, and introduce newly developed technologies to the market by teaming with entities in consumer optics and automotive products.

Training will focus on production planning, inventory control, lean manufacturing, and process improvement techniques.

Retrainee - Job Creation

The Panel offers incentives to companies that commit to hiring new employees. Newly-hired trainees (Job Number 2) will be subject to a lower post-retention wage.

In 2017, Luminit launched a new transparent holographic component for consumer optics. The Company is constructing a new production facility to accommodate the manufacture of this new product. Commercial production of this new high technology product will begin within the next four months. Luminit has committed to hiring seven new employees (Job Number 2) to facilitate the Company's planned growth. Newly-hired employees will require extensive training to successfully support business expansion and increased volume.

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 provided via class/lab in the following:

Business Skills: Training will be offered to all occupations. These modules will focus on strategic thinking and planning, use of analytics, interpersonal communication, marketplace analysis, negotiation skills and customer satisfaction.

Computer Skills: Training will be offered to all occupations. Training will focus on improving skills in the use of Microsoft Dynamics AX ERP system, particularly after enhancements and improvements planned for the ERP system this year. The Admin/Sales staff will receive enhanced training in CRM software. Other training will include SolidWorks for Engineering staff, Matrix barcode technology for Production employees, and the use of simple to complex formulas and Pivot tables for all staff. This training is designed to provide workers with the business application tools to perform their respective job duties more efficiently.

Continuous Improvement: Training will be offered to all occupations. Trainees will learn process improvement and problem solving methodologies that enhance productivity through Lean enterprise principles, Kaizen concepts and risk mitigation techniques.

Manufacturing Skills: Training will be offered to Production and Engineering Staff. These training modules will cover various aspects of equipment operation and maintenance. This training will improve product quality, reduce errors/waste, and enhance the Company's overall production process.

Training Infrastructure

The Director of Quality will oversee scheduling, delivery, and tracking of training. Lead personnel from additional departments will assist with project coordination. The Company has also retained an experienced administrative consultant to ensure that training and documentation adhere to ETP requirements. Training will be delivered by in-house experts and vendors as needed.

RECOMMENDATION

Staff recommends approval of this proposal.

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

8 - 60 Trainees may receive any of the following:

BUSINESS SKILLS

- Analytics
- Communication and Conflict resolution
- Contracts and Resulting Obligations
- Customer Satisfaction – Understanding and Negotiating Requirements
- Document Management
- Leadership, Team Development and Mentoring
- Metrics
- Negotiation
- Risk Assessment/Management
- Strategic Thinking and Planning
- Take Advantage of disruptive Trends in the Marketplace
- Understanding, Measuring and Managing Company's Financial Health

COMPUTER SKILLS

- Crystal Reports
- CRM Software
- Design of Experiments and Statistical Analysis using Excel
- Label Matrix barcode
- MathCAD
- Microsoft Dynamics AX ERP Sstem
- Microsoft Office
- Organization of Luminit Computer Network
- Sage 100
- SolidWorks
- UPS/FEDX Supply Chain

CONTINUOUS IMPROVEMENT

- 5S
- Advance Product Quality Planning
- Error Proofing Business Practices
- ISO 9001, IATF 16949, and Conforming to Aerospace and Medical Device Standards
- Kaizen Concepts
- Lean Manufacturing
- Process Performance Measures
- Risk Mitigation Techniques – Flow Charts, Control Plans, PFMEA Root Cause Analysis and Problems Solving
- Six Sigma Methodology and Tools

MANUFACTURING SKILLS

- Equipment Operations and Maintenance
- Operational Planning and Processes
- PPAP - Production Part Approval Process
- Reading Engineering Drawings – Tolerances and Symbols
- Production Machinery
- Preventive and Predictive Maintenance
- Supply Chain Management
- Warehouse Management
- Workplace Organization

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



**TRAINING PROPOSAL FOR
OMNI Consulting Solutions LLC
18-0546**

Panel Meeting Date: May 24, 2018
Regional Office: North Hollywood Regional Office
Analyst Name: Margarita Paccereilli
Type of Proposal: Single Employer (SB), Small Business Program
Funding Source: SET

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$36,960.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$36,960.00	N/A	\$0.00	\$30,000.00

APPLICANT PROFILE

Company Summary	OMNI Consulting Solutions LLC (OMNI) (www.omniconsultingsolutions.com) is a Veteran Administration certified Service Disabled Veteran Owned Small Business (SDVOSB). The Company provides "cradle to grave" project management consulting services to federal, state, local, and commercial clients, industry partners, and federal government agencies.		
Industry Sector(s)	Professional, Scientific, and Technical		
Priority Industry	No		
No. Employees (Applicant)	State: 23	US: 31	World Wide: 31
Turnover Rate (Applicant)	8.00 %		
Repeat Contractor	No		

High Unemployment Area	No
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Training will enable employees to be cross functional to stay abreast of changing technologies and requirements.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Owner, Retrainee	2	\$22.00	60	\$1,320	8 - 60
1	Retrainee	21	\$22.00	60	\$1,320	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	5	\$22.00	60	\$1,320	8 - 60

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 2011, and headquartered in El Segundo, OMNI provides "cradle to grave" acquisition consulting services to both industry partners and federal government agencies in support of major defense acquisitions. The Company delivers the highest quality expertise in a variety of acquisition functional disciplines, including program, contract, and financial management.

The proposed training will be delivered at its sole location in El Segundo.

2. Current Training Project Details

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

Purpose of Training	<p>This will be OMNI's first ETP Agreement. OMNI primarily provides services to the defense aerospace industry. This industry is highly technical and heavily regulated.</p> <p>As a small business, OMNI has limited budget to train its employees. ETP funds will allow OMNI to provide training in the industry's latest methodologies, best practices and tools to develop trainee skills professionally and to better consult with its clients. Training is essential to the Company's business operations and success.</p>
Training Infrastructure and Administrative Plan	<p>Training is scheduled to begin upon approval. OMNI will dedicate two Senior Analysts to oversee training and administration responsibilities including scheduling training, coordinating with staff, securing rosters and complying with all ETP requirements. Training will be delivered by in-house subject matter experts and vendors as needed. OMNI's current training budget is \$40,000.</p>
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

PROPOSED TRAINING PROJECT DETAILS

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations will receive Class/Lab training in Business, Continuous Improvement, and Computer Skills (Attachment 2).	

4. Additional Company or Training Project Details

Retrainee-Job Creation

The Panel offers incentives to companies that commit to hiring new employees. Training for newly hired employees will be subject to a lower post-retention wage. With increased demand for its services, OMNI is expanding its workforce and is committed into hiring and training five newly-created Analyst positions (Attachment 1).

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

4.1 Program Waivers

No waivers have been applied to this proposed project.

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	N/A	N/A	N/A
Administrative	N/A	N/A	N/A
Training	To Be Determined	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Client Management
	Contracting
	Contract Management
	DoD Audit Process
	Graphics Management
	Internal Controls Development
	Leadership Communication
	Planning and Budgeting
	Program Management
	Project Scheduling
	Proposal Production
	Proposal Support
	Research Methodologies
	Technical Software
Technical Writing	
Computer Skills (Standard)	Adobe Illustrator
	Financial Software
	General Ledger Accounts
	Graphic Design
	IT Troubleshooting
	MS Office Outlook, Word, Excel, Access
	Oracle
	QuickBooks
Social Media	
Continuous Improvement Skills	Agile Program Management
	Problem Solving and Decision Making
	Six Sigma
	Team Building



**Retrainee - Job Creation
Training Proposal for:
Oven Fresh Bakery, Incorporated**

Small Business

ET18-0202

Approval Date: March 27, 2018

ETP Regional Office: San Francisco Bay Area

Analyst: A. Townsend

CONTRACTOR

- Type of Industry: Manufacturing
Wholesale Trade
Priority Industry: Yes No
- Number of Full-Time Employees
California: 15
Worldwide: 15
Number to be trained: 14
Owner Yes No
- 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

FUNDING

- Requested Amount: \$17,368
- In-Kind Contribution: \$12,459

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, Computer Skills, Cont. Improv., Mfg. Skills, OSHA10/30	12	8-60	0	\$1,274	\$18.22
				Weighted Avg: 49			
2	Retrainee SB <100 Job Creation Initiative	Cont. Improv., Mfg. Skills, OSHA10/30	2	8-60	0	\$1,040	\$15.18
				Weighted Avg: 40			

- Reimbursement Rate: Job #'s 1 & 2: \$26 SB Priority
- County(ies): Alameda
- Occupations to be Trained: Leads, Managers, Owner, Production Staff, Sales & Marketing Staff.
- Union Representation: Yes
 No
- Health Benefits: Job #2: \$1.58 per hour

SUBCONTRACTORS

- Development Services: Manex Consulting of San Ramon assisted with development at no cost.
- Administrative Services: N/A
- Training Vendors: To be Determined

OVERVIEW

Established in 1975 and headquartered in Hayward, Oven Fresh Bakery, Incorporated (Oven Fresh), produces, sells and distributes over 50,000 croissants and other pastry products daily. The Company sells to leading regional distributors and retail establishments in Northern California.

The Company’s training goal is to ensure employees understand the changes in Global Food Safety Initiatives and to be in compliance with the requirements to achieve Level 2 Safe Quality Food (SQF) certification. Oven Fresh Bakery needs to expand the capabilities of its workers to be multi-functional and increase efficiencies in purchasing and delivery of its bakery products. The Company will also implement Lean Manufacturing techniques, and Leadership development training for Leads, Supervisors and Managers. The goal is to create Standard Operating Procedures (SOP) for all key processes to support the planned 10% expansion in 2018.

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.

Oven Fresh has committed to hiring two new employees (Job Number 2) to support demand for pastry products in new regional markets. The Company will be expanding its distribution network in Los Angeles, Arizona, Colorado, Nevada, Oregon and Washington.

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

Training Plan

This is Oven Fresh’s first ETP project. The Company proposes training in Business, Computer, Continuous Improvement, Manufacturing Skills and OSHA 10/30. All training will be delivered as Class/Lab at its Hayward facility by in house subject matter experts. Training vendors will be determined at a later date.

Business Skills: This training will be offered to Managers, Sales and Marketing staff, Leads, and the Owner. Trainees are staff that interact with customers and suppliers. Therefore, these trainees will learn Sales and Marketing skills customized for small-sized manufacturers to secure new accounts.

Computer Skills: Training will be provided to Managers, Sales and Marketing staff, and Leads. As the Company grows, staff need training in Information, Data Integration, Scheduling, Accurate Quoting and Pricing, Purchasing and Delivery. These skills are necessary to achieve customer satisfaction and to meet increasing demands for efficient delivery of goods, product fulfillment, and inventory.

Continuous Improvement: Training is offered to all occupations in SQF, the Food Safety Modernization Act, Hazard Analysis and Critical Control Points, and Current Good Manufacturing Practice (cGMP) requirements for food safety. Additionally, the Owner, Managers, and Leads, will be trained in Lean Manufacturing techniques to reduce waste, improve on-time delivery, and reduce throughput times to meet increasing customer demands. Leadership courses will include Communication, Team Building and Negotiation Skills.

Manufacturing Skills: Training will be provided to Production Staff including Managers and Leads, on the new SOPs for equipment and production processes. Additionally, topics on equipment maintenance, correct sanitation and change-over practices per SQF and cGMP requirements will be offered. All workers will be cross trained.

Certified Safety Training

OSHA 10/30. This training is a series of courses “bundled” by industry sector and occupation. It consists of 10 hours of classroom or CBT training for journey-level workers and 30 hours for frontline supervisors. The coursework is geared to construction work, 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.

Managers, Production Staff, and Leads will be offered safety training to help improve and maintain the Company’s safety record. The training will support Oven Fresh’s compliance with SQF Food Safety Requirements.

Training Infrastructure

Oven Fresh Bakery is ready to start training upon approval of this proposal. The Office Manager will oversee training and project administration. Training will be delivered by a combination of in-house staff and vendors at the Hayward facility.

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

- Developing Sales Strategies
- Developing Marketing Strategies
- Human Resources
- Marketing for Small/Medium Sized Manufacturers:
- Evaluating Marketing Effectiveness
- Marketing Concepts
- Marketing Techniques
- Practical Marketing Applications
- Negotiating Skills
- Business Administration for Small/Medium Sized Mfg.

COMPUTER SKILLS

- Spreadsheets
- Powerpoint
- Quickbooks

CONTINUOUS IMPROVEMENT

- HACCP / Food Safety / SQF / FSMA
- Lean Manufacturing
- Leadership Skills
- Communication
- Creative/Innovative Thinking
- Decision Making
- Developing Action Plans
- Developing Solutions
- Effective Teams
- Empowerment Process
- High Performance Work Teams
- Multicultural Communication/Diversity
- Problem Solving
- Self-directed Work Teams
- Situation/Problem Solving
- Team concepts
- Team Building/Problem Solving
- Teamwork in an Empowered Workforce

MANUFACTURING SKILLS:

- Maintenance Mechanic Overview Level 1
- Maintenance Mechanic Overview Level 2
- Manufacturing Processes
- Shipping / Receiving

OSHA:

- OSHA 10 HOUR PROGRAM
- OSHA 30 HOUR PROGRAM

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



TRAINING PROPOSAL FOR
Rebas, Inc., dba Toyota-Lift of Los Angeles
17-0865

Panel Meeting Date: 05/24/2018
Regional Office: North Hollywood Regional Office
Analyst Name: M. Niquet
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 48,600.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 48,600.00	N/A	\$ 0.00	\$ 50,000.00

APPLICANT PROFILE

Company Summary	Toyota-Lift is a premier distributor of material moving and handling equipment.		
Industry Sector(s)	Trade (Wholesale)		
Priority Industry	No		
No. Employees (Applicant)	State: 135	US: 135	World Wide: 135
Turnover Rate (Applicant)	4.00 %		
Repeat Contractor	No		
High Unemployment Area	Yes		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	The training in this proposal will assist the Company in growing its customer base by improving the skills of its employees and service to its customers. Training will improve the quality of work, resulting in higher quality products and service to customers and increased company moral.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	135	\$ 15.00	24	\$ 360	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 1984 and headquartered in Santa Fe Springs, Rebas, Inc. dba Toyota-Lift of Los Angeles, (Toyota-Lift) is a premier provider of quality brands of material moving and handling equipment such as forklifts, aerial lift equipment, and utility vehicles. Customers include manufacturing companies, distributors, and construction companies throughout Los Angeles County, Pasadena, Long Beach and Santa Monica.

2. Current Training Project Details

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

Purpose of Training	<p>As a premier forklift dealer and maintenance servicer, Toyota-Lift's once simple forklift has now become more technical, with more electronics on board than ever before and increased capability of smaller machines to lift heavier loads than in the past. Every machine has a specific business purpose and are in constant use. Therefore, when a machine breaks down it can negatively affect the business and must be repaired quickly.</p> <p>The Company plans to train 135 trainees over the next 21 months. Training will help the Company meet customer expectations by improving the productivity of its employees. Toyota-Lift has a training plan in place that will improve the skill level of each technician to meet company standards. Advancements in technology require updated training to maintain the required skills necessary to perform job functions. In addition, training will also focus on implementing a new CRM System designed for the Company's Sales team. This will be extensive training lasting for at least the next six months.</p> <p>Business Skills training will be offered to all occupations. Training will consist of product knowledge to provide better-informed options to customers. Topics will include communication and customer service skills, financing quotes and product sales skills.</p> <p>Commercial Skills will be offered to Technicians and Parts staff. Training will allow for flexibility in assigning workloads. The goal is to have each technician cross-trained on every product line. Topics will include Electronic E cooling Systems, Planned Maintenance training and Advanced Troubleshooting.</p> <p>Computer Skills training will also be offered to all occupations.</p>
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PROPOSED TRAINING PROJECT DETAILS

	<p>Training will enhance skills around various functions including payroll, purchase orders, managing the CRM, and keeping track of lease agreements. Training will allow staff to utilize software from various vendors that is constantly being upgraded to offer more features and capabilities</p> <p>Continuous Improvement Skills will be offered to all occupations and will move the company to a higher level of performance through training in Team Building, Decision Making and Process Improvement.</p> <p>Training will take place at the Company's multiple locations in Santa Fe Springs and Buena Park. Training 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	<p>Toyota-Lift spends an estimated \$500,000 annually in training at their California facilities. The Company currently provides on-the-job training related to specific job functions. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.</p> <p>The Company's Senior Vice President of Finance as well as select supervisors in each of the two locations will oversee training delivery, scheduling, and tracking. The Company has also retained Training Refund Group, of Anaheim to ensure that training administration and documentation adhere to ETP requirements.</p>
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

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

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

PROPOSED TRAINING PROJECT DETAILS

Technicians and Parts staff will receive training in Commercial Skills (Attachment 2).
 Safety Training is capped at 10% of a trainee's total training hours.

Delivery Method/Level	E-Learning - Computer Based Training (CBT)
Summary	
All occupations will receive CBT training in Business Skills and Computer Skills (Attachment 2). Technicians and Parts staff will receive CBT training in Commercial Skills (Attachment 2).	

4. Additional Company or Training Project Details

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

4.1 Program Waivers

No waivers have been applied to this proposed project.

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Training Refund Group	Anaheim	N/A
Administrative	Training Refund Group	Anaheim	13%
Training	TBD	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory	
Training Type (Level)	Planned Course Offerings	
Business Skills	IFSC Communication Skills	
	IFSC Customer Service Skills	
	IFSC Financing Quotes and paperwork	
	IFSC How to Sell Battery Powered Equipment	
	IFSC Marketing and Product Sales Skills	
	IFSC Hydraulic Attachment Operation Product Knowledge	
	TLA Communication Skills	
	TLA Customer Service Skills	
	TLA How to Sell Battery Powered Equipment	
	TLA Hydraulic Attachment Operation Product Knowledge	
Commercial Skills (Safety)	IFSC Safety Training	
Computer Skills (Standard)	IFSC A/P - TRINDOCS Usage	
	IFSC ADP- Time & Attendance Usage	
	IFSC DYSEL Business Usage	
	IFSC Technician EveryWare Usage	
	TLA ADP , Payroll and Benefits Usage	
	TLA Docusign Template Creation & Usage	
	TLA DYSEL Business Usage	
	TLA Microsoft CRM Usage	
	TLA Technician EveryWare Usage	
	TLA TMHU SAP QUOTING SYSTEM Usage	
	TLA TRINDOCS Usage	
Continuous Improvement Skills	IFSC Team Building	
	IFSC Decision Making & Problem Solving Skills	
	IFSC Leadership Skills	
	IFSC Toyota Kaizen Skills	
	IFSC Toyota Lean Management Training	
	TLA Team Building	
	TLA Decision Making & Problem Solving Skills	
	TLA Leadership Skills	
	TLA Lean Concepts	
	TLA Process Improvement	
	TLA Safety Training	
	TLA Toyota Kaizen Skills	
	TLA Toyota Lean Management Training	

Delivery Method /Level	E-Learning – Computer Based Training (CBT)	
Training Type (Level)	Planned Course Offerings	Standard Hours
Business Skills	TLA Black Belt Equipment Training	15.00

Attachment 2 - Training Delivery and Curriculum Listing

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

	TLA CSS Boot Camp Training	15.00
	TLA Equipment Boot Camp Training	15.00
	TLA Financing Quotes and Paperwork	15.00
	TLA Leases and Rentals	15.00
Commercial Skills (Standard)	IFSC Advanced Troubleshooting	4.00
	IFSC Class III Electric Truck Product	4.00
	IFSC Doosan BASICS Module Training	4.00
	IFSC Electrical Systems & Theory	4.00
	IFSC Electronic Engine Cooling Systems	4.00
	IFSC Forklift Operator Training	4.00
	IFSC General Products & Engines	4.00
	IFSC Hazmat Handling Training	4.00
	IFSC Hydraulic Systems & Powertrain	4.00
	IFSC IC Chassis Electrical Diagnosis	4.00
	IFSC Mast Inspection and Repair	4.00
	IFSC Planned Maintenance	4.00
	IFSC Sit Down Electric Truck Product	4.00
	IFSC Stand-up Electric Product	4.00
	TLA Advanced Troubleshooting T-410	20.00
	TLA Bronze Technician Training Program	8.00
	TLA Class III Electric Truck Product T-330	8.00
	TLA Electrical Systems & Theory T220	8.00
	TLA Electronic Engine Cooling Systems T-340	8.00
	TLA Forklift Operator Training	8.00
	TLA Foundations for Success T-100	3.00
	TLA General Products & Engines T-210	8.00
	TLA Gold Technician Training Program	8.00
	TLA Hazmat Handling Training	3.00
	TLA Hydraulic Systems & Powertrain T-240	8.00
	TLA IC Chassis Electrical Diagnosis T-230	8.00
	TLA Mast Inspection and Repair T-130	8.00
	TLA Planned Maintenance T-110	8.00
	TLA Platinum Technician Training Program	2.00
	TLA Silver Technician Training Program	8.00
	TLA Sit Down Electric Truck Product T-310	8.00
	TLA Stand-up Electric Product T-320	8.00
	TLA Technician Introduction Training	480.00
	TLA Toyota BASICS Module Training	8.00
Computer Skills	IFSC ADP , Payroll and Benefits Usage	32.00
	IFSC Microsoft CRM Usage	12.00
	TLA Excel Intermediate	25.00

Attachment 2 - Training Delivery and Curriculum Listing

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

	TLA HR/Organizational development	25.00
	TLA Other/Sytems updates	8.00



**Retrainee - Job Creation
Training Proposal for:
Rockstar Recruiting, LLC dba Staff Rehab**

Small Business

ET18-0203

Approval Date:

ETP Regional Office: San Diego

Analyst: J. Davey

CONTRACTOR

- Type of Industry: Services

 - Number of Full-Time Employees
 - California: 20
 - Worldwide: 20
 - Number to be trained: 28

 - Out-of-State Competition: Competitors Outside CA
 - 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: \$23,232
- In-Kind Contribution: \$45,000

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100	Business Skills, Commercial Skills, Computer Skills, Continuous Impr	16	8-200	0	\$792	\$17.50
				Weighted Avg: 36			
2	Retrainee Job Creation Initiative SB <100	Business Skills, Commercial Skills, Computer Skills, Continuous Impr	12	8-200	0	\$880	*\$14.58
				Weighted Avg: 40			

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

- Reimbursement Rate: \$22 SB Non-Priority
- County(ies): Orange
- Occupations to be Trained: Administrative Staff, Owner, Recruiting Staff, Sales Staff
- Union Representation: Yes
 No
- Health Benefits: Up to \$1.95 per hour

SUBCONTRACTORS

- Development Services: Training Funding Source in Seal Beach will provide development services for a flat fee of \$1,900.
- Administrative Services: Training Funding Source will also provide administrative services for a fee not to exceed 13% of earned funds.
- Training Vendors: To Be Determined

OVERVIEW

Headquartered in Newport Beach and established in 2009, Rockstar Recruiting, LLC dba Staff Rehab (Staff Rehab) is an educational outsourcing service provider that recruits and places skilled, professional special education teachers, therapists, and other healthcare and special needs service providers to school districts and educational organizations. Staff Rehab provides both temporary and permanent placements in California, Washington, Illinois, Georgia, and Maryland. The Company works with public schools, private schools, non-public special education schools, charter schools, and pediatric outpatient clinics.

Need for Training

Over the last year, Staff Rehab has grown rapidly and needs to add more staff, which will require extensive training. There are several reasons for increased growth: Healthcare is a booming business, with a shortage of healthcare workers. In addition, the rise in retirement of the aging baby boomer population has left a shortage of experienced special education professionals. These factors place the Company on a path for continued growth for the next two decades. Consequently, to meet market demands, the Company needs to provide a range of skills for its Recruiters, Sales Staff, Administrative Staff and its Owners.

Additionally, Staff Rehab recently implemented a new application tracking and customer relationship management software system. This new system will streamline core personnel management services.

Training Plan

Training will be delivered via class/lab by a combination of internal trainers and vendors in the following:

Business Skills - Training will be offered to all staff in skills such as Coaching/ Communication, Contract Negotiation, Leadership, Marketing & Business Development, Planning, and Sales. Training in these skills will increase productivity, improve customer satisfaction and enhance creativity by introducing new ways of doing business.

Commercial Skills - Training will be offered to all staff in skills such as Accounting, Product Knowledge, and Tax Regulations. Training in these skills will provide employees the necessary skills to correctly bill clients and reduce mistakes in paying doctors and staff.

Computer Skills - Training will be offered to all staff in skills such as Application Tracking System/Customer Relationship Management software, and MS Office. Training in these skills will provide employees the necessary skills to improve efficiency in recruiting/sales.

Continuous Improvement Training will be offered to all staff in skills such as Business Planning & Development, Change Management, Problem Solving, Teambuilding, and Conflict Resolution. Training will help the Company achieve quick and efficient customer service.

Training Infrastructure

The Manager of Talent Development will be the contact for this proposal and assist with creating the curriculum, scheduling, and monitoring. Additional staff will assist in collecting rosters and working with the administrative subcontractor, Training Refund Source, to ensure proper and timely administration.

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. Trainees must be hired within the three-month period prior to Panel approval or during the term of contract.

Staff Rehab is expanding business capacity by hiring 12 new staff (Job Number 2) to support its growing business. To accommodate these new employees, the Company has moved to a new office twice the size of its previous location. The Company's current headcount is now 20, up from 16 when the Company had initially applied for funding, and is currently actively recruiting

for eight more employees. The Company expects to hire them within the next eight weeks. These new employees will need extensive training in the Company's systems and processes to meet the Company's business needs.

Modifications

Staff Rehab requests an increase in the maximum range of hours from 60 to 200. The Company anticipates training some newly-hired Recruiting and Sales employees (3-5 employees) along with the Owners over the 60 hours small business cap. Employees receiving more than 60 hours are new to the industry and will require substantial training for adequate skills to conduct their jobs. In addition, the Company is requesting a two-year agreement term so that it has adequate time to deliver necessary training.

RECOMMENDATION

Staff recommends approval of this proposal.

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

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- Coaching/Communication
- Contract negotiation/admin
- Client Relations
- Credentialing
- Email & Phone Etiquette
- Human Resource procedures
- Leadership
- Marketing & Business Development
- Meeting efficiency
- Specialties
- Planning
- Presentation
- Recruiting
- Sales
- Succession Planning
- Time Management/Multi-Tasking
- Work processes
- Pricing Guidelines

CONTINUOUS IMPROVEMENT

- Business Planning & Development
- Change Management
- Key Performance Indicators
- Process/Quality/Performance Improvement
- Problem Solving Skills
- Teambuilding
- Conflict Resolution

COMPUTER SKILLS

- Applicant Tracking System (ATS) - SmartSearch
- Database Management
- Marketing Tools
- MS Office
- Dropbox (Cloud software)
- Email Access
- Star2Start Phone System
- Google Docs
- Risk Management Software
- Quickbooks Online
- Heartland Ovation System
- Job Board Sourcing

COMMERCIAL SKILLS

- Accounting Principles (General Ledgers, Debits and Credits)
- Bank Wiring/ Reconciliations
- Employee Benefits Regulations (COBRA, ACA, HIPAA)
- Product Knowledge
- Reporting Requirements
- Tax Regulations
- Lockbox instructions

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



**In-House Amendment #2 Proposal for:
United Exchange Corp.
Agreement Number: ET17-0306**

Amendment Effective Date: December 10, 2016

ETP Regional Office: North Hollywood

Analyst: M. Niquet

CURRENT PROJECT PROFILE

Contract Type:	Priority SB<100 Retrainee	Industry Sector(s):	Goods Movement Transportation/Logistics
Counties Served:	Los Angeles, Orange, 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 08, 2016 to December 07, 2018	Substantial Contribution:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

CURRENT FUNDING

Current Funding
\$24,180

AMENDMENT FUNDING

Requested Funding	Total Funding
+\$15,730	\$39,910

AMENDMENT TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimate d No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate SB<100	Business Skills, Comm'l Skills, Computer Skills, Cont. Imp.	62	8-150	0	\$572	\$16.48
				Weighted Avg: 22			
2	Phase II Retrainee Priority Rate SB<100	Business Skills, Comm'l Skills, Computer Skills, Cont. Imp.	9	8-135	0	\$494	\$16.70
				Weighted Avg: 19			

Minimum Wage by County: Job Number 1: \$16.48 per hour for Los Angeles County and **\$16.51 per hour for Orange County**

Job Number 2 (Phase II): \$16.70 per hour for San Bernardino

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

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

Up to \$3.23 per hour in Job Number 1; and up to **\$2.50 per hour for Job Number 2**

Wage Range by Occupation	
Occupation Title	Wage Range
Job Number 1	
Manufacturing/Distribution Staff	
Operations Staff	
Administrative Staff	
Supervisor/Manager	
Owner	
Job Number 2 (Phase two)	
Manufacturing/Distribution Staff	
Operations Staff	
Administrative Staff	
Supervisor/Manager	

INTRODUCTION

Founded in 1993, United Exchange Corp., (UEC), (www.ueccorp.com) specializes in the sales, marketing, and distribution of control and private label products in the Health & Beauty Aid and Household Care categories throughout the United States and abroad. UEC provides products and services for food, drug industry, and retailers. The company’s personal and household care product lines include personal care, pet care and household cleaning products. The Company

has recently added a new division, which includes medical care products such as first aid kits, burn kits, wound care products and bandages.

AMENDMENT DETAILS

UEC recently relocated its main facility from Cerritos to Cypress. The Company also invested in a new warehouse in Rialto, which requires hiring additional staff as business expands. To ensure that UEC continues to meet customer demands without any interruptions, UEC has increased training at both locations, in Quality Control and Process Improvement. Existing trainees need additional training for more efficient workflow. UEC requests an addition \$15,730 in ETP funding to continue training in the Southern California Region.

In summary:

- Increases the total funding amount by \$15,730, from \$24,180 to \$39,910
- Increases the weighted average hours (Job Number 1) from 15 to 22
- Increase maximum training hours (Job Number 1) from 8-135 to 8-150
- Increases the average cost per trainee (Job Number 1) from \$390 to \$572
- Adds Orange County to Job Number 1
- Adds new Job Number 2 (Phase 2)

UEC requests an effective date of 12/10/16 for Phase I. Phase II (Job Number 2) will have an effective date of 1/19/18, the day of the initial contractor amendment request. Trainee wages in Job Number 2 are for CY2018.

RECOMMENDATION

Staff recommends approval of this Amendment.

SUMMARY OF PRIOR MODS/AMDS

- Modification No. 1: Added 12 months to the term of the Agreement and increased the maximum training hours from 60 to 135. This Modification was approved on 10/26/17.

CURRENT CONTRACT PERFORMANCE

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

Agreement No.	Approved Amount	Term	No. Trainees Enrolled	No. Completed Training	No. Retained
ET17-0306	\$24,180	12/08/16-12/07/18	68	TBD*	TBD*

*To date, 1272 eligible training hours have been tracked (100% of the current Agreement amount). Fifty trainees have reached the 8-hour minimum requirement.

Exhibit B: Menu Curriculum

Class/Lab Hours

8-150 (Job 1)

8-135 (Job 2)

Trainees may receive any of the following:

BUSINESS SKILLS

- Accounting
- Coaching/Communication
- Payables and Receivables
- Customer Relations
- Goal Setting, Company Vision
- Inventory Control
- Product Knowledge
- Project Management
- Selling Tactics
- Time Management
- Business Writing Skills

COMMERCIAL SKILLS

- Assembly
- Inspection Techniques
- Inventory Control-Cycle Counting
- Operations (Distribution Skills-Receiving, Shipping)
- Order, Picking, Packing
- Quality Control

COMPUTER SKILLS

- Electronic Data Interchange
- E Commerce Tools
- E-Mail Marketing Tools
- Microsoft Office
- Netsuite ERP Software
- SQL Server
- Script Writing for Report Generation
- Walmart Retailink

CONTINUOUS IMPROVEMENT

- Process Improvement
- Teambuilding
- Leadership Skills

Note: Reimbursement for retraining is capped at 150 total training hours per trainee in Job Number 1; and capped at 135 in Job Number 2, regardless of the method of delivery.