

PANEL PACKET

OCTOBER 2017





NOTICE / AGENDA

MEETING TIME/PLACE

Friday, October 27, 2017 at 9:30 a.m.
California Environmental Protection Agency, 1001 I Street
Sierra Hearing Room, Second Floor
Sacramento, CA 95814
Phone: (916) 327-5640

AGENDA

- | | | |
|------------|---|--|
| 9:30 a.m. | Call to Order by Chair <ul style="list-style-type: none">• Roll Call• Agenda• Minutes | Barry Broad |
| 9:45 a.m. | Report of the Executive Director <ul style="list-style-type: none">• Legislative/Budget/Other• Request Motion to Delegate in Event of Loss of Quorum/Action• Request Motion to Adopt Consent Calendar Projects/Action | Stewart Knox |
| 10:15 a.m. | Report of the General Counsel <ul style="list-style-type: none">• Action to Appoint Subcommittee on Substantial Contribution• Information on Top-Level Executives in Professional Firms | Maureen Reilly |
| 10:30 a.m. | Review and Action on Proposals | Diana Torres
Anna Nastari
Mark Mazzone |
| 11:45 p.m. | Strategic Plan FY 2017-2018 | Lis Testa |
| 12:15 p.m. | Public Comments | |

Panel Date: October 27, 2017

12:30 p.m. Public Meeting Adjourns

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

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 Other changes may also occur (e.g. withdrawn).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

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

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

REVIEW AND ACTION ON PROPOSALS

These funding proposals are listed by Regional Offices and do not reflect the actual order of presentation. They will be considered by the Panel in accordance with a Table of Contents to be published on the ETP website no later than Monday, October 23, 2017 although the Panel may still change the order at the meeting.

North Hollywood Regional Office

Anchor Healthcare, LLC -----	\$249,964
BEGA North America, Inc. -----	\$89,658
Chatsworth Products -----	\$73,710
Dytran Instruments, Inc. -----	\$201,852
Eastwestproto, Inc. dba Lifeline Ambulance -----	\$316,000
Emser Tile, LLC -----	\$245,700
Finishing Trades Council of District Council 36 Joint Apprentice Training Trust Find -----	\$949,595
Giligia College -----	\$70,572
Greater San Fernando Valley Chamber of Commerce -----	\$187,176
Gumbiner Savett Inc. Certified Public Accountants & Business Advisors -----	\$62,480
Kern Community College District -----	\$582,000
Koos Manufacturing, Inc. -----	\$245,862
Landscape Development, Inc. -----	\$167,400
Lockheed Martin Corporation -----	\$400,602
Momentous Insurance Brokerage Inc. -----	\$117,990
W.E. O'Neill Construction Co. of California -----	\$111,240

San Diego Regional Office

California Faucets, Inc. -----	\$108,000
California Sheet Metal Works, Inc. -----	\$132,818
KML Enterprises Career Development, LLC dba New Horizons Learning Group -----	\$421,300
Omni Hotels Management Corporation dba Omni La Costa Resort and Spa -----	\$171,800
SchoolsFirst Federal Credit Union -----	\$333,000
Sheet Metal and Air Conditioning Apprenticeship and Journeyman Training Fund of San Diego -----	\$307,800

San Francisco Bay Area Regional Office

Andrew Furuseth School of Seamanship-----	\$54,593
KLA-Tencor Corporation (AB118) -----	\$432,000
Mann Packing Co., Inc. -----	\$294,400
Northern California Shop Ironworkers Apprenticeship and Training Fund Trust -----	\$50,720
Pyramid San Francisco Management LP -----	\$130,800
Sensiba San Filippo, LLP -----	\$108,120

Sacramento Regional Office

Bay Alarm Company (Amendment) -----	\$199,400
B-K Lighting, Inc. -----	\$129,980
Fresno Surgery Center, LP -----	\$240,256
Kcoe Isom, LLP -----	\$111,675
Napa Valley College -----	\$42,340
Tiger Lines, LLC -----	\$65,065
Treehouse Private Brands, Inc. -----	\$174,860

PROPOSALS APPROVED
BY DELEGATION ORDER FOR 9/12/17 – 10/10/17

≤ \$50,000	Approved Date	Approved Amount
<u>San Diego Regional Office</u>		
Elrob, Inc.	09/18/17	\$49,400
Phoenix Energy Technologies, Inc.	09/18/17	\$48,880
Roorda, Piquet & Bessee, Inc., A Professional Accountancy Corporation	10/06/17	\$16,830
Stage One Financial, LLC	09/29/17	\$9,680
Wright Ford Young & Co., Certified Public Accountants and Consultants, Inc.	10/06/17	\$26,840
<u>San Francisco Bay Area Regional Office</u>		
Cork Supply USA, Inc.	09/11/17	\$49,932
Sila Nanotechnologies, Inc.	09/19/17	\$48,906
<u>Sacramento Regional Office</u>		
Allergy, Immunology & Asthma Medical Group, Inc.	09/18/17	\$33,440
Bokisch, Inc.	09/29/17	\$14,400
Citadel Premium Design, Inc.	09/29/17	\$37,440
Direct Marketing Partners	09/29/17	\$20,460
Eco.logic Brands Inc.	10/03/17	\$23,140
ICORE International, Inc. dba Zodiac Interconnect US	09/26/17	\$25,200
Northern Central Distributing, Inc.	09/11/17	\$46,640
Pactiv LLC	09/18/17	\$31,860
PLM Operations, LLC	09/29/17	\$49,270



TABLE OF CONTENTS

Panel Meeting of October 27, 2017

PRELIMINARY MATTERS

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

OTHER MATTERS

Strategic Plan FY 2017-18

REVIEW AND ACTION ON PROPOSALS

Consent Calendar

Tab

Anchor Healthcare, LLC -----	1
Andrew Furuseth School of Seamanship -----	2
BEGA North America, Inc. -----	3
B-K Lighting, Inc. -----	4
California Faucets, Inc. -----	5
California Sheet Metal Works, Inc. -----	6
Chatsworth Products, Inc. -----	7
Dytran Instruments, Inc. -----	8
Emser Tile, LLC -----	9
Fresno Surgery Center, LP -----	10
Giligia College -----	11
Greater San Fernando Valley Chamber of Commerce -----	12
Gumbiner Savett Inc. Certified Public Accountants & Business Advisors -----	13
Kcoe Isom, LLP -----	14

Koos Manufacturing Inc.-----	15
Landscape Development, Inc. -----	16
Momentous Insurance Brokerage Inc. -----	17
Napa Valley College -----	18
Northern California Shop Ironworkers Apprenticeship and Training Trust Fund -----	19
Pyramid San Francisco Management LP -----	20
Sensiba San Filippo, LLP -----	21
Tiger Lines, LLC -----	22
Treehouse Private Brands, Inc.-----	23
W.E. O'Neill Construction Co. of California -----	24

Proposals for Single-Employer Contractors **Tab**

North Hollywood Regional Office

EastWestProto, Inc. dba Lifeline Ambulance -----	25
Lockheed Martin Corporation -----	26

San Diego Regional Office

Omni Hotels Management Corporation dba Omni La Costa Resort and Spa-----	27
SchoolsFirst Federal Credit Union -----	28

San Francisco Bay Area Regional Office

Mann Packing Co., Inc. -----	29
------------------------------	----

Proposals for Multiple-Employer Contractors **Tab**

North Hollywood Regional Office

Finishing Trades Institute of District Council 36 Joint Apprentice Training Trust Fund-----	30
Kern Community College District -----	31

San Diego Regional Office

KML Enterprises Career Development, LLC dba New Horizons Learning Group-----	32
Sheet Metal and Air Conditioning Apprenticeship and Journeyman Joint Training Fund of San Diego-----	33

AB118 **Tab**

KLA-Tencor Corporation -----	34
------------------------------	----

Amendments **Tab**

Bay Alarm Company -----	35
-------------------------	----

SUMMARY OF DELEGATION ORDERS

Delegation Orders

Tab

Allergy, Immunology & Asthma Medical Group, Inc.
Bokisch, Inc.
Citadel Premium Design, Inc.
Cork Supply USA, Inc.
Direct Marketing Partners
Eco.logic Brands Inc.
Elrob, Inc.
ICORE International, Inc. dba Zodiac Interconnect US
Northern Central Distributing, Inc.
Pactiv LLC
Phoenix Energy Technologies, Inc.
PLM Operations, LLC
Roorda, Piquet & Bessee, Inc., A Professional
Accountancy Corporation
Sila Nanotechnologies, Inc.
Stage One Financial, LLC
Wright Ford Young & Co., Certified Public Accountants
and Consultants, Inc.



M e m o r a n d u m

To: Panel Members Date: October 27, 2017

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

Subject: **Directions to Meeting Site**

The Employment Training Panel will meet on FRIDAY, **October 27, 2017 at 9:30 a.m.**

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

Directions to the California Environmental Protection Agency - Sierra Hearing Room

From Sacramento International Airport:

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

From San Francisco

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



M e m o r a n d u m

To: Panel Members

Date October 27, 2017

From: Stewart Knox
Executive Director

File: Mtg. Site Memo

Subject: **Future Meeting Sites**

October 27, 2017	California Environmental Protection Agency Time: 09:30 AM Sierra Hearing Room, 2nd Floor 1001 I Street Sacramento, CA 95814
November 2017	NO PANEL MEETING IN NOVEMBER 2017
December 8, 2017	California Environmental Protection Agency Time: 09:30 AM Sierra Hearing Room, 2nd Floor 1001 I Street Sacramento, CA 95814
January 26, 2018	New City Hall Time: 09:30 AM Council Chambers Room 1103 951 I Street Sacramento, CA 95814



**STATE OF CALIFORNIA
EMPLOYMENT TRAINING PANEL**
Sacramento City Hall
California Environmental Protection Agency
1001 I Street, Sierra Hearing Room
Sacramento, CA 95814
September 22, 2017

PANEL MEMBERS

Barry Broad
Chair

Janice Roberts
Vice-Chair

Gloria Bell
Member

Will Koch
Ex-Officio Member

Gretchen Newsom
Member

Edward Rendon
Member

Jeff Robinette
Member

Sam Rodriguez
Member

Executive Staff

Stewart Knox
Executive Director

Maureen Reilly
General Counsel

**STATE OF CALIFORNIA
EMPLOYMENT TRAINING PANEL**
Sacramento City Hall
California Environmental Protection Agency
1001 I Street, Sierra Hearing Room
Sacramento, CA 95814
September 22, 2017

I. PUBLIC PANEL MEETING CALL TO ORDER

Chairman Barry Broad called the meeting to order at 9:35 a.m.

II. ROLL CALL

Present

Gloria Bell

Barry Broad (departed at 11:45 a.m.)

Will Koch

Gretchen Newsom

Janice Roberts

Jefferson Robinette

Absent

Edward Rendon

Sam Rodriguez

Executive Staff Present

Stewart Knox, Executive Director

Maureen Reilly, General Counsel

III. AGENDA

Chairman Broad asked for a motion to approve the Agenda.

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

Motion carried, 6 - 0.

IV. MINUTES

ACTION: Ms. Roberts moved and Ms. Bell seconded the motion that the Panel approve the Minutes from the August 25, 2017 meeting.

Motion carried, 6 - 0.

V. REPORT OF THE EXECUTIVE DIRECTOR

Stewart Knox, Executive Director, said welcome and good morning Panel members, applicants, and stakeholders. Following the last Panel Meeting in August, we have a smaller Panel Meeting today, totaling approximately \$9.8M with another \$168K in Delegation Orders for a total just over \$9.9M.

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

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

In regard to Core Funds for FY 2017/18, today the Panel will consider an additional \$9M in projects and another \$168K approved by Delegation Order. Should the Panel approve all the projects today, ETP will have approximately \$50M the remainder of the Fiscal Year (FY) 2017/18.

Under Delegation Order, all project proposals are capped at \$50,000 to be approved by the Executive Director on a continuous flow basis, which as of today, 5 projects were approved totaling just under \$168K.

For FY 2017/18 program funding to date, we have approximately 345 projects submitted, with a value of just over \$100M. The Panel has already approved just under \$45M with 180 projects to date, if all proposals are funded today.

Regarding applications for contracts that are remaining in the Regional Offices: Single Employer Contract requests are at \$29M; \$24M in allocation. Multiple Employer Contract (MEC): Regional Offices/AAU: requests are at \$6.5M; \$12M in allocations. Small Businesses have \$4.5M in demand; \$4.1M in allocations. Critical Proposals are at \$525K in demand; \$4.2M in allocations. Apprenticeship programs are at \$3.9M in demand; \$3.7M in allocations. Overall demand is approximately \$50M.

The number of total projects in FY 2016/17 in the Regional Offices are 265; total number of projects in the Applications and Assessment Unit is 80; overall total of 345.

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

Legislative Update

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

VI. MOTION TO ADOPT CONSENT CALENDAR PROJECTS

Chairman Barry Broad asked for a motion to adopt Consent Calendar Items #1 through #15.

AAA Plating & Inspection, Inc.....	\$104,100
Asian Neighborhood Design, Inc.....	\$195,714
Bay Ship & Yacht Co.....	\$ 94,548
Diversified Communications Services, Inc.....	\$ 83,200
Driscoll's, Inc.....	\$244,800
Dynamic Signal, Inc.....	\$238,576
Integrated Media Technologies, Inc.....	\$ 63,960
Jackson Family Wines, Inc.....	\$241,488
J M Construction & Engineering, Inc.....	\$ 53,040
Kruger Foods, Inc.....	\$108,000
Lakeshore Equipment Company.....	\$142,740
Pactiv, LLC.....	\$ 69,336
PB Loader Corporation.....	\$ 71,760
Stapleton=Spence Packing Co.....	\$ 50,700
Vander-Bend Manufacturing, LLC.....	\$200,952

ACTION: Ms. Newsom moved to approve the consent calendar for Items #1 through #15 and Ms. Roberts seconded the motion.

Motion carried, 6 – 0.

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

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

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

Motion carried, 6 – 0.

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

Also of note, the Panel Packet, as you may have noticed, has about four different versions; three from the new system and one from the Legacy system. Based on this last year (almost a full year), and many different issues that have come from the system, we are working with the vendor and our staff to see if there is a better way to do this. For example, looking at this year as the sand box. Effective immediately we are pulling it off line to see what needs to be fixed, improved, and completely done away with currently within the ETMS system. We are seeking an improved solution for data management and looking at our lessons learned in the last year with ETMS. We have already started to look at new versions of a system going forward. This contract technically ends in June 2018 and it is good business to look ahead for improved technology. This is for your information only at this time and we will report back what we decide to do.

Mr. Broad said, based on the new system, I would like to keep the granular job information about qualifications by county and wage. Currently, we know they will get paid after “x” and “y” and it is very helpful to know this. Further, it helps when they are requesting a modification because we are able to see why the modification is being requested.

VIII. PRESENTATION ON SUBSTANTIAL CONTRIBUTION / RATE SETTING

Presented by Lis Testa, Planning and Research Unit

Substantial Contribution – Recommendation

- Since the Legislation allows but does not require ETP to apply the Substantial Contribution:
 - ❖ Stop applying Substantial Contribution
 - ❖ Panel can still impose Substantial Contribution if deemed necessary
- Enact a Repeat Contractor Rule
 - ❖ Raise cap for MECs to \$2 Million and cap for Single Employers to \$950,000
 - ❖ Contractors may return for an additional contract when:
 - A minimum of 18 months have passed since the start of their contract term; and,
 - They have reached 75% completion on their current contract
 - ❖ The Panel may impose an additional reduction to funding on a case-by-case basis
 - ❖ MECs will be limited to \$500,000 for first-time projects

Discussion:

Ms. Roberts said, I thought we were looking at *after* the term of their contract, possibly 18 months.

Ms. Testa said, if the contract is two years, instead of letting them just re-apply automatically, we want them to wait 18 months into their existing contract and have 75% of their contract finished before they reapply. We are giving them a higher cap and this allows them the time to use the money, log all the training hours, and do the invoicing.

Ms. Roberts said, so how is this different from what we have in place now?

Ms. Testa said, this would limit them for 18 months. It would extend the time they have to work on their current contract.

Mr. Knox said, many times they are reapplying after 6 months. It takes about 4 to 6 months to get through the application process. What's happening is that they get half way through the year and reapply.

Ms. Testa said, but they might only be 1/3 of the way through their current contract.

Mr. Broad asked, what would it be for Single Employers? It seems that we are still left with the affiliation relationship problem. We need to make sure this issue is addressed.

Ms. Testa said, the original Substantial Contribution in the legislation says that it has to be applied on a per facility basis. This is where that per location requirement comes from, and the one thing that makes it complicated to figure out for staff and the companies. By doing the Repeat Contractor Rule it gets rid of the per location requirement. As far as the affiliates go, we have limited the number of affiliates that a Single Employer can have, with the exception of healthcare. When they are a Single Employer with an affiliate the main employer is the contract holder, the affiliates are not actually the contract holders so they are not responsible for logging their training hours.

Mr. Knox said, to your point Chairman Broad, the issue is if they have separate CEAN numbers, which many companies do by location, then technically they can all apply separately.

Mr. Broad said, here is what I view as a potential problem with this. Single Employer and Multiple Employer contracts are different because the employers change, at least theoretically. The whole point of Substantial Contribution is that it gets so expensive that eventually they decide not to come back and fund it themselves. It's one thing for us to be in a place where we are permanently funding apprenticeship programs, which we are close to doing with MEC's, but it is not appropriate with Single Employer contracts. This is a training grant program. We could be training the same people on the same things, doing similar things and while we can add Substantial Contribution, we won't have any policy in existence for figuring out why we are doing it. We will be doing it based on some emotional response, which, as a Panel Member, I don't feel comfortable with. It's disincentive to doing that. What it feels like is that your punishing one company based on a subjective standard.

Ms. Roberts said, before, we would never impose Substantial Contribution if it was like a Critical Proposal is that still the criteria?

Ms. Testa said, I would think it would still be the same especially Critical Proposal because they are coming from the office of economic....

Ms. Roberts said, is it 18 months they fall under the same guidelines or all of sudden we say it's a Critical Proposal.

Ms. Testa said, in their pilot and guidelines for Critical Proposals it says that they are not eligible for Substantial Contribution. I would say, this would stay the same.

Ms. Roberts said, if it's like on the Delegation Order and they are under \$50,000 are they following under the same guidelines?

Ms. Testa said, we have not actually discussed the contract limit with this, but it would be possible to apply. For example, if it's at least \$250K, then the Repeat Contractor Rule would apply, or whatever limit you think would be appropriate.

Ms. Roberts said, the reason we put the Substantial Contribution in, is that they are large amounts of money for the same employer coming back over and over again. With the small businesses, we are penalizing them. I just don't know what the right answer is.

Ms. Testa said, this is why we would put a Repeat Contract Rule for everyone then it's kind of fair across the board. They are small projects and especially for small businesses if they are trying to grow.

Mr. Broad said, maybe 18 months is just too short. What that rule is saying is that there is never any gap in funding. You can have constant money from ETP for all the time for the rest of time. Maybe it should be 3 years for a Single Employer. Or three years for a Single Employer if the contract is over \$100K.

Mr. Knox said, we could apply it to the MEC and then take a look at the Single Employer because, your right, the discrepancies between the two is important. The current role is the cap plus once a year. Right now they are coming back every year and that's a staff capacity issue, in addition to them burning away \$750K or \$950K on a yearly basis.

Ms. Torres said, you bring up an excellent point. One of the things we can look at is everything is based on the employer, the actual employer, the pay-rolled employer. We can look at limitations, time, or money, based on the actual California Employer Account Number. That's what everything gets charged to and every employee is connected to. We can find out who is connected with the employer.

Mr. Broad said, we are supposed to be creating high wage jobs not low wage jobs. We're not supposed to be a permanent funding source for Single Employers. That is certainly not our mission. This is a grant program. It is supposed to be on the merit of training. A lot of people made applications, tried to role the staff, get in front of the Panel, and then try to lobby the Panel in an effort to turn it more into a political decision than it is now. We've changed that creating a much more empowered staff to try and send the message out successfully that you need to listen to what the staff says. You can't roll the staff. Which means we approve a lot more of these things. There are fewer contentious projects and that's a deliberate policy that the Panel over the years has really implemented. More of a bureaucratic process and in a perfect world we want to eliminate that. In doing that, we can't sacrifice using our judgment about what is a good proposal and what is a bad proposal. A proposal on its merits doesn't need to be approved or funded at that level. I'm worried that we are heading more in that direction and I want to make sure we don't. Whatever we decide

to do here, I'm sympathetic. These changes, a lot of them make sense to me. We need think carefully before we move forward and I would like to hear comments from the public about this, what they think about this, whether they agree or disagree with the points we are making, and maybe even beyond what is narrow self-interest into what is good policy. There is nothing wrong with self-interest, but sometimes we need to look beyond and see what the best policy would be for taxpayers as a whole.

Mr. Koch said, I have one question with respect to the Critical Proposal and the proposed cap to the Single Employers of \$950, how would the Critical Proposal be impacted by the raise?

Ms. Testa said, we didn't actually talk about it, but I will defer to Mr. Knox.

Mr. Knox said, Critical Proposals can be waived essentially based on the Governor's office of Business and Economic Development presented to the Panel from that perspective. Technically, we have always followed the MEC amount, which on this proposal is \$2M, but generally it could be much higher based on the Governor's initiatives and what he has going forward.

Mr. Broad said, with regard to Critical Proposals, the underlying policy has always been (regardless of administration or political party in charge) to empower the Governor to try and lure business into the state and keep it from leaving California. We want to protect that. There has to be some discipline in that process as well. We typically defer to the Governor on these questions.

Mr. Knox said, we will bring back some ideas. We wanted to get your input.

Reimbursement Rates – Review of Current Practice

- The Legislation and Regulations state that ETP may reimburse reasonable training and administrative costs, and that for fixed-fee contracts, may reimburse with a flat rate per hour for categories of training that are substantially similar (business size, complexity of training, training delivery method, duration of training, and type of trainee), and that Panel may adjust the rates as needed to reflect changes in training costs.
- ETP currently has a table which includes ten different fixed-fee reimbursement rates split along different lines of type of trainee, type of project, and type of curriculum.

(**NOTE: Tables included on the last page of the minutes)

Reimbursement Rates: Where did they come from?

- Many were established in 1990 when our Regulations changed to allow Fixed-Fee contracts.
 - ❖ These have had a series of amendments and COLAs, in conjunction with the creation of the Pilots and Guidelines outlined above, to arrive at our current rate structure

- ❖ Examples of these original rate categories; CBT, Standard Retraining, New Hire, Advanced Technology
- ❖ Small Business and Critical Proposal rates were added in 2000
- ❖ Priority Industry rate was added in 2006

Pilot/Guideline	Effective	Rate
Apprenticeship	3/2012	Apprentices: \$13, Pre-App/Journeymen: \$22 (blended PI \$18 w/ PI SB \$26)
AB 118	4/2010	PI rate (\$18, \$26 SB)
Career Work Experience for At-Risk Youth	1/2017	New Hire Rate (\$20, \$8 CBT)
CNA-LVN	Pilot 1/2006, Guideline 8/2009	Standard Retraining (\$18, \$8 CBT)
Ex-offender/ At-Risk Youth	9/2007	New Hire Rate (\$20, \$8 CBT)

Pilot/Guideline	Effective	Rate
Individuals with Disabilities	10/2015	Per job number
Medical Skills	10/2008	Medical Skills \$22, CT \$8, Advanced Tech \$26, non-clinical class/lab \$18
Productive Lab	1/2011	Standard (Depending on population & project type, \$13, \$15, \$18, \$20, \$22, \$26)
Retrainee Job Creation	1/2011	New Hire rate (\$20, \$8 CBT)
Temporary-to-Permanent	4/2007	Standard (Depending on population & project type, \$13, \$15, \$18, \$20, \$22, \$26)
Veterans	10/2008	\$22, \$26 for PI SB, \$13 Apprentices

Discussion:

Mr. Broad said, do you have any sense that there is any rational basis between one rate and another rate?

Ms. Testa said, for some things. It makes sense that CBT is reimbursed at a lesser rate than Advanced Technology. It makes sense that Priority Projects have a higher rate compared to

a non-priority project. For some things it makes sense to emphasize areas of our program that we want to encourage, i.e. Veteran's, etc.

Ms. Reilly said, if I may attempt to answer your question Mr. Broad, the rates were established through plenty of research units, surveys, and studies. I believe it was based on what the private sector costs for training were at the time. As indicated, we have increased once since then for cost of living. The CBT rate was based on the fact of you talking about a one-time cost to create this non-interactive diskette and is now web-based that can be used over and over again. Even at \$8 that's a pretty good deal. The Advanced Technology rate was based on the higher cost of living, meaning that you had to have a higher skill level for the instructors and you have a lower class ratio 1-10 that cuts your class size in half. The small business rate was an incentive when that pilot project first launched at least 10 years ago. The Veteran's rate is an incentive rate being somewhat higher than the Priority Industry rate which is still at \$18. Some of those blended rates like the medical skills rate or the journeyman rate were a combination of Priority Industry for retraining and for new hires or for large businesses and small businesses. We were trying to strike some balances and address the actual employer population in a given job number under our old system. Another good example is the Apprentice rate is the Priority Industry rate minus the \$5 of Montoya funding so you get your \$13, so there is logic to it but it has become very complicated. The analysts are used to reimbursement rate sheets as they do the job numbers through ETMS which is all logically programed into the contract cost structure. We are suggesting something simplified so that the public can understand. We'll take one more look at it with the history in mind, but moving forward into what actual costs are today and what would be reasonable.

Reimbursement Rates, Wages and Contract Structure

- Contract values are determined pre-Panel and pre-contract execution with this basic formula:
 - ❖ Number of trainees x number of training hours x reimbursement rate
- These values are not verified until:
 - ❖ After the invoice process has begun; and again,
 - ❖ At the close of contract when all training and retention periods have been completed.
- At contract close, ETP uses the company's CEAN to verify the employment and wage levels of trainees, along with the training hours logged.
- Often, at the start of the contract, companies are 100% sure which employees will participate, and their employee population can change over the course of a contract.
- To shift this workload to the front end of the ETP process would not negate the need to also complete it at the end of the contract, putting undue strain on staff resources.

Discussion:

Ms. Roberts said, we have reimbursed \$18 per hour for the majority of the workforce but a lot of them are only getting \$12 even with health benefits or even \$13 with health benefits, we were paying over \$5 over for what they were actually earning was there any question that seemed inequitable?

Ms. Testa said, the companies are also paying for their wages, etc., trainer's wages, and for their rent at the facilities so they have all those other elements that goes into their costs.

Mr. Knox said, we follow mostly the training cost, not the employee cost, that is part of the 100% match, but unlike them, we have programs in which they follow the wage of the employee because those are usually new hire employees, it's a job creation side, it is what we do on the other side.

Ms. Roberts said, California is the only one who pays the trainee's wage. If you go to any other state say Texas for one, they only pay the trainer's wages.

Ms. Reilly said, we don't actually pay the wages. That may be something the Panel certainly looks at and Chairman Broad refers to it as "bang for the buck," why are we paying \$18/hour when someone is earning \$13/hour, but we don't actually pay wages. The money goes to the employer or the MEC contractor who reimburses the employer for the cost of the training so that's correct we do pay the trainer wages.

Ms. Newsom said, the Vice Chair really hit this on the head for me that there has been potential inequity, for instance, the seasonal farm workers being reimbursed the \$15 rate but most of the workers are being paid the minimum wage. It seems that the company was making money off the workers and the training and it did not sit right with me.

Reimbursement Rates – How JATC Rates Are Calculated

- Apprenticeship rates are currently set at \$13
- This is the standard rate (\$18), minus the \$5 dollars in Montoya (RSI) funds that JATCs receive to supplement their training costs
 - ❖ The current Montoya (RSI) rate is actually closer to \$6
 - ❖ Montoya (RSI) funds are used to supplement the cost of the Related Supplemental Instruction (RSI) component of Apprenticeship training programs
- Our funds go only to the RSI component of Apprenticeship training programs
- ETP funds cannot be used to supplant other sources of funding, so we subtract the cost of the Montoya (RSI) funds from the standard reimbursement rate
- The rates are established in the Apprenticeship Pilot Program
 - ❖ Pre-Apprentices and Journeymen receive a blended rate of \$22, which averages the Priority Industry \$18 rate with the \$26 Small Business Priority Industry rate

Methods for Simplifying Reimbursement Rates

- Goal is to make this process more streamlined and easier to execute
- Reduce the number of different rates and the number of classifications in the rate chart
- The original chart uses 3 variables (trainee type, training delivery method type, and project type)
 - ❖ We will present one option for each of these variables, so that each example only uses one variable to create the rate chart

- ❖ We will present one option that uses all three variables, but in a simplified way

Reimbursement Rate – Option 1

- Delineate Rates **only** by type of trainee:

<u>Trainee Type</u>	<u>Rate</u>
New Hires and Retrainee Job Creation	\$26
Retrainees	\$23

**apprentice rate reduced by the Montoya (RSI) fund level (\$5)*

- Simplifies rate table, gives most populations a raise
- Similar to other states
- Does not account for other aspects of the ETP program that we may wish to either emphasize or discourage – therefore, not recommended

Reimbursement Rate – Option 2

- Delineate Rates **only** by type of industry:

<u>Industry Type</u>	<u>Rate</u>
Priority Industry	\$26
All Other Industries	\$23

**apprentices rate reduced by the Montoya (RSI) fund level (\$5)*

- Simplifies table, giving most populations a raise
- Does not account for other aspects of the ETP program that we may wish to either emphasize or discourage – therefore, not recommended

Reimbursement Rate – Option 3

- Delineate Rates **only** by type of training delivery method:

<u>Training Delivery Method Type</u>	<u>Rate</u>
CBT	\$9
Class Lab/Productive Lab/e-learning	\$23
Advanced Technology	\$26

**apprentices rate reduced by the Montoya (RSI) fund level (\$5)*

- Simplifies table, giving most populations a raise
- Does not account for other aspects of the ETP program that we may wish to either emphasize or discourage – therefore, not recommended

Reimbursement Rate – Option 4 – Recommendation

- Adopt a new Reimbursement Rate Table
 - ❖ The new table has only four rates and only four possible variations, as compared to 37 variations under the old table
 - ❖ The new table gives nearly all groups an increase in reimbursement rate

- ❖ Gives the highest rate to ETP identified priorities (i.e.: Veterans, Priority Industries, Retrainee Job Creation, etc.)
- ❖ Does not require a change in Legislation or Regulations
- ❖ Last time rates were raised was in 2006

Reimbursement Rate Table – Recommended Option

<u>Rate Category</u>	<u>Reimbursement Rate</u>
CBT	\$9
Apprenticeship	\$21
Non-Priority Retrainees	\$23
Special Populations: i.e.; Priority Projects	\$26
Critical Proposals, New Hires, RJC, Small Business, Veterans, Advance Technology	

Discussion:

Mr. Broad said, what is the rationale for a small business being reimbursed at a higher rate than a bigger business?

Ms. Testa said, that partially comes from the original pilots and guidelines that gave the emphasis on small business programs. In addition, sometimes it's more expensive for them to train so we decided to put them in the higher rate category.

Mr. Broad said, it's more expensive for small business because they don't get a discount on the training or what?

Ms. Testa said, they don't always have a person to designate to do the contracts and they may have to hire out a trainer.

Mr. Bell said, you're saying the small businesses have lesser resources than the large company, they have a training center and people specifically for that position.

Ms. Newsom said, going back to the apprenticeship rate, it's \$21 because your factoring in the \$26 minus \$5 Montoya Fund.

Ms. Testa said, correct.

Next Steps

- Please note that ANY change to the Reimbursement Rates will require the Pilots and Guidelines to be updated
- Take away as action item for a future Panel Meeting
 - ❖ Please let us know which option for Reimbursement Rates you would like
 - ❖ Please let us know when you would like these before you request a vote
 - Substantial Contribution
 - Reimbursement Rates

- Let us know any comments, questions, concerns, or suggestions you may have

Discussion:

Mr. Broad said, they don't have to be approved at the same time do they?

Ms. Testa said, no.

Mr. Broad said, it seems the reimbursement rate is a simpler issue. The proposal you made at the end after the series of editorial, makes sense to me but I don't know how the rest of the Panel feels.

Ms. Roberts said, I like the proposal we have on board now. From a staff or Panel perspective, it would be easier to manage and understand. With regard to Substantial Contribution, maybe we should have a subcommittee. I wouldn't mind sitting, maybe Chairman Broad, we have the most experience with Substantial Contribution. Maybe get some of our input as to what would be more agreeable to the Panel as well as the staff.

Mr. Broad said, that makes sense, maybe we will have a subcommittee to deal with that. Why don't we at least start with proposing this as possibility and bring it back and give everybody notice that we will discuss it so that we get a response from our community and see what they think. Let's bring it back to the next panel meeting.

IX. REPORT OF GENERAL COUNSEL

Maureen Reilly, General Counsel, provided the following report:

Per the agenda, I have one action item and two informational items. For the first item, turn to your packet to "other matters." See the memorandum. I would like to walk through this memorandum with you. It speaks to the valuation of health benefits as included in trainee wages to meet the contract standard post-retention wage, and at issue, to best reconcile to statutory provision that is somewhat at tension. These are in the definition of job in your enabling legislation, that definition is also where the authority comes to value the healthcare benefits. For those of you who want to skip ahead, if you turn to page 3, you will see what we are driving at, which is to place a reasonable cap on the valuation of healthcare benefits, unless the value can be verified in writing or documented in writing so we know it's reliable. Right now, we are accepting the employer's representations.

Moving back to the beginning, you will see before you an excerpt from the statute, this is definition of job – UI Section 10201(f). The key language here is that employment must lead to definite career potential and a substantial likelihood of providing long term job security with reportable California earnings during the employment retention period. At the very end you will see that the Panel was granted authority to consider the value of health benefits. The original legislation came about in 1983. The last proviso on healthcare benefits came 10 years later. The Panel has always interpreted or considered the values to mean to include the value in wages to meet the reportable earnings requirement. There is one other wage standard, one other primary wage standard, that is in the statute. It is section 10214.5 for

special employment training. Another amendment was made to enable legislation in 1993. That says that SET trainees should make, or the goal is, the statewide average hourly wage which is considerably higher than the county-by-county wage. The county-by-county wage comes from the definition of job that is basic core wage and then you have it set to the state core wage. We believe in extending authority to consider the value of health benefits, the legislation meant to include it in the county wage as well as the statewide wage. You will see a little bit of that analysis on top of page 2 in italics and other places in italics.

But moving on, the Panel did implement a regulation in 1995, and recently, well not recently, it was amended in 2005, the basic thing there is that the value of health benefits may be included in wages so long as it is reliable and verifiable and that's still in the regulation section 4418. Reliable and verifiable has been somewhat interpreted to mean the employer's representation. That does not mean the Panel can't impose a stricter interpretation to say it has to be with written documentation which is what we recommend. Again, in regard to statutory requirements that earnings are reportable and the ability to include the value or consider the value of health benefits. What does reportable mean? California payroll reporting. This is per EDD wage data base and when you think about the value of health benefits it is not in payroll reporting. It is not a taxable item. Payroll reporting is designed to withhold taxes for multiple reasons, personal tax, other taxes, health benefits are not in there so we can't verify that through the wage data base. Considering the value in relying on employer representations, there can be many issues. The employer's share of costs for health benefits has always varied from one company to another. It's subject to collective bargaining for represented occupations. The employer's costs depend on the extent of coverage elected by the employee, single, plus one or family. That can change from one open enrollment period to another. All of which creates further uncertainty. These variations and uncertainties persist today even though most employers are required to pay a threshold share of costs under the Affordable Care Act. In addition, with the Affordable Care Act mandate for employer paid health benefits, the employee is usually expected to share in the premium costs and there is good evidence to suggest that private sector employees may opt out of this all together to avoid this cost. The decision to opt out varies per trainee and is almost impossible to document. Given all of these factors we have come to realize that relying on the employer's representation, which is usually for every trainee, is that \$5 or \$6 is not reliable and not verifiable so our recommendation is to only accept the value of health benefits as included in wages if there is reliable written documentation. For example, a collective bargaining agreement where the employer's commitment is spelled out very clearly or another contract for employment, absent that, we recommend putting a reasonable cap which at least gives us some assurance that we're not dealing with so many variations. Based on a presentation from a couple of months ago and taking into consideration studies and, in particular a Kaiser Foundation survey, we came up with \$2.50 as a reasonable cap on health benefits. This would be across the board and we believe this should be made effective at the top of the year given a full 90-day cycle for program development and that you would first start to see the cap in the proposals brought in January 2018.

Mr. Broad says, under the current way we handle this, when are employers claiming the payment of health benefits? Do we have any idea what percentage of employees take up the coverage?

Ms. Reilly said, no.

Mr. Broad said, so you could potentially have one of these employers that offers the coverage but the share of costs for employees is so high that none of them will take up the coverage?

Ms. Reilly said, correct.

Mr. Broad said, so we are letting them qualify for our money based on their low wages, plus money they don't spend.

Ms. Reilly said, correct.

Mr. Broad said, well that's got to get fixed. If we do this \$2.50 thing, can we have the employer say under some kind of penalty of perjury that they are spending \$2.50/hour on healthcare for every employee that is getting training?

Ms. Reilly said, Mr. Chair I wouldn't recommend penalty of perjury, but we have in fact used employer verifications as an insurance in the past as another assurance of reliability. Again, as interpreted in the regulation these healthcare benefits must be reliable and verifiable so as that with the \$2.50 reasonable cap we could also require an employer certification that at least that amount is being offered to the employees in the trainee population.

Mr. Broad said, what about offered but not taken up?

Ms. Reilly said, we don't know.

Ms. Roberts said, you can get samples – payroll information from the HR department which runs down exactly all the compensation that the company pays the employee from wages, health benefits, bonuses, so you can actually get samples of every employee.

Ms. Reilly said, correct, and in audits they do that level of detail. They will get payroll, however, we don't believe we have the staff capacity and sufficient staff resources to go into that level of detail for every proposal. It's something to be considered, but we have not during the development cycle ever asked the employer to see details.

Mr. Broad said, It's galling to me that we can give employers credit for healthcare that no one is actually getting, potentially not getting, or a large percentage of employees not getting. I don't see that. Whoever wants to comment on this, please feel free.

Mr. Duscha stands up to speak: Mr. Chairman we are all turning ourselves inside out and ignoring the real issue which is what is the minimum wage, cash wage for people you will fund training for. Nobody eats health benefits, it does not provide food on the table, does not pay rent. Under the existing system, under this system for a new hire, you take the existing minimum wage, subtract \$2.50 for health benefits, and ETP is funding training for people at the state minimum wage. That's wrong. That's not what ETP is about. You need to look at all of these things together. That is what you were talking about earlier, about the repeat contractor. What is it that you want to fund?

Mr. Broad said, the problem is that our state, like our country, has moved to a lower wage based economy. Employers don't pay people as much as they use to. We have a lot of low wage employers here and the \$20/hour which we view at ETP as a big wage, which is around \$37,000/year, is no longer a high wage anymore. So the people getting \$15, \$16, \$17/hour are not doing very well. The statute does allow us to take into account healthcare and we want to encourage people to buy healthcare. Maybe at some point when we have a system where every single person is covered by healthcare and has to be covered, the employer contribution is a fixed thing that they all have to do we can eliminate it. It is no longer an issue. We still need to look at healthcare. I want to make sure they are actually providing it.

Mr. Rob Sanger from CMTA said, just on the healthcare issue, staff is really good about emphasizing to the employers that they have to take the coverage, not just offer the coverage. We do this in MEC contracts, we strongly emphasize with the employers that maybe ETP will audit the wages and then check on the welfare of certain individuals. They don't check everyone. If they are telling us \$4 or \$5 /hour on healthcare, then we ask for more details. We know some of these employers and generally know what \$2.50 and general costs average if they are taking it. We do have employers that pay higher wages so that \$4-\$5/hour pays all of the healthcare. If they are paying everything it can be \$4-\$5/hour. The program was started for companies that were growing in California that could also do business elsewhere like manufacturers, high tech and those companies in those industries also have upward mobility. There is a lot jobs these days, call centers, warehouse jobs, where you just know that where you're starting is where you're ending. Those types of jobs we don't want to fund. We want to fund jobs that have upward mobility. Once you figure out what sector you want to fund, the rest falls into place.

John Brauer with the California Labor Federation. I want to speak in support of the recommendation and remind you all that the calculation is not just the wage. Our unions when they are bargaining are also discussing with the employer a health package particularly of great value. This proposal speaks to the fact that it is more than just that particular wage that workers and unions are thinking about when they are sitting down with their employers and coming to a collective bargaining agreement. Reflecting a true way of what the actual value is and what is actually taking place.

Mr. Broad said, the reality is the cost of healthcare is eating up the wage increases in every single wage contract cycle. That's the bigger problem. Nobody is getting a raise.

Mr. Brauer said, for our folks there are differences in sectors for folks who may have a wage that has been negotiated but also significantly better health benefits. The fact that you're trying to ask for verification and considering the whole, not just the wages, is important.

Ms. Reilly said, I would just like to respond to some very well placed comments we just heard. We could amend this recommendation to say that absent written documentation which could include payroll, not only a collective bargaining agreement or a contracted employer, the payroll would be written documentation, absent that expanded scope of written documentation the reasonable cap applies. I return your attention to the statutory requirement for reportable California earnings which is the back bone of our system. It is not a true grant, it's actually a performance standard and the wages are perhaps the biggest one. After that comes retention.

Mr. Broad said, what if we said that with the caveat that if you take the \$2.50, you have to spend that \$2.50 on everyone who gets the coverage or you don't get reimbursed for that.

Ms. Reilly said, again, that's a bit of the problem because it's the employee's election as well. You make a choice during the open enrollment period about what your election is. If your wife or husband has coverage you may take that cafeteria plan option where they actually buy you out. If you have a child, you move on to a family coverage. These things fluctuate.

Mr. Broad said, but they are getting the \$2.50. However, it's also the employer's election to come here and ask for the health benefit because the wages are not enough. They don't pay enough to meet our minimum wage. They're saying they want you to include the healthcare benefits we spend and presumably this \$2.50/hour for a full-time employee is \$400/ month for healthcare, which doesn't buy much for healthcare. So that's a partial payment for employee only healthcare. The \$2.50 we choose should be an amount that any employer that is supplying healthcare will have to pay; otherwise, there is no point in having a shortcut.

Ms. Roberts said, when you look at what we see here there is a big range of wages. I'm looking at one for instance, a technician wage pays \$21-\$42/hour. We're going to train 8 of those. They want a \$1.04 to match the Los Angeles County minimum wage. Maybe there is only 1 of those people that fall into that boundary. The other 7 may get \$42/hour. Why don't we just not train that one person?

Mr. Knox said, statistically, about 50% of the contracts request health benefits be applied, only 8% actually use it of the total that we train.

Ms. Roberts said, don't include them in the contract then.

Mr. Broad said, or decide or figure it out in advance.

Ms. Roberts said, one said \$.13 we're going to add \$.13 to someone's wages. Maybe it is just one person. Take them out the equation.

Mr. Broad said, or give them a \$.13/hr. raise. There is a lot of ways to do it. It's all in the control of the employer, if we're going to do a shortcut for administrative convenience of the employers and our staff, it is the minimum we should ask for instead of actually paying the wages. We do actually require that they pay the wages they say they are going to pay. Which is verifiable. People quit and go away. Healthcare is just another wage, it's another part of your wage it's not handed out as a paycheck.

Ms. Reilly said, it is earnings and not part of your hourly wage and that's why it's not included in the payroll report, plus it's not taxable. If it's not in payroll reporting, it's not verifiable through EDD wage data base. We're suggesting that unless it's verified through written documentation which the company can provide or not, then the cap is at \$2.50.

Mr. Broad said, there is an annual insurance thing, everyone has to make their election annually. They have to stick to that program for an entire year, which means that every employer knows. I don't think it's much of a burden to say if you take the \$2.50, you have

pay the \$2.50, you have to pay at least \$2.50 in healthcare wages or else you don't get reimbursed for that employee.

Ms. Torres said, that's exactly what happens. They are required to pay their proportion they put into the agreement if they do not meet the ETP wage. For instance, let's say right now is open enrollment and I chose FlexElect next year my employer would not be paying that portion they were paying. So remember the agreement was done 3 months ago so it's because our agreements run 2 years, remember it's at the end of the agreement.

Ms. Reilly said, we put a valuation of health benefit in the contract as it springs out of the proposal - which is itself a result of the development process when we work with the employer. We do what we can to verify but it's still by their representation. When we are doing final payment, which is typically 18 months down the cycle, then fiscal may review health benefits but it is without payroll. Again, we don't have any written documentation. As I said, we could say that payroll is acceptable as written documentation, otherwise, the cap is at least an indicia of reliability. Regarding the comment about \$400/month, Mr. Knox you calculated what State of California employees get from the employer by way of payment toward the share of costs, averaging something like that. We are supposed to be the Cadillac plan, it's not much more than \$2.50/hour. Mr. Duscha's remarks we need to look at the entire system, is very lofty and admirable, nevertheless, that may take several months, if not a good year, and right now we are in development. That's why we suggested a 90-day grace period but then begin to propose the cap to proposals brought in January. We are in development right now, we recognize the issue, and hope that Panel recognizes it as well.

Mr. Broad said, I recognize the issue I just want a definitive answer. If you don't pay the \$2.50, then we don't reimburse you for that employee.

Ms. Bell said, being an HR professional I know that there are HR systems that can draw a report on employees regarding healthcare, demographics, and so forth. But keep in mind that some employees during open enrollment waive, or choose not to, maybe their spouse has insurance maybe they are making \$11.50 and they have a family of four they qualify for Medi-Cal so that report would not show you that information. However, it would be a starting point.

Mr. Broad said, there is nothing that stops the employer from saying I'm taking the \$2.50/hour on job no. 1, 2 and 3 but not on the whole thing.

Ms. Roberts said, it's 8% and it is a small amount.

Mr. Knox said, regarding Chairman Broad's point, at least in audits, because this came up last year, that is exactly what happens, we see those employees just are not paid out. Typically, what they do is switch it out because they uploaded more trainees than they have for hours to be included. They can switch those employees out. In the larger employers, we don't pay them in the end. We just don't verify up front while we do, but it happens at the end.

Mr. Broad said, I don't care if they switch someone out, I just don't want to pay it out at the end. I don't have a problem with that. It does sound like it is resolved.

Ms. Newsom said, this is something that I struggled with since I arrived at the Panel and have been very focused on. There is a part of me that swings to a more progressive stance of just eliminating that cost contribution for anyone who doesn't have the CBA or an employment contract. I'm finding that this a more reasonable approach, so taking a little step back and with promise that they are paying the \$2.50 at the end, I can be supportive of this.

Mr. Broad said, are we at the point of the action item or is there anything more to discuss?

Ms. Reilly said, I just want to make sure you are voting for the recommendation as it is set forth in the memorandum?

Mr. Broad said, yes, that would be the motion with the added or additional requirement to clarify that they certify by the end of the contract that they have actually paid it out on at least that much for healthcare on all the employees, and if there is someone that isn't, they don't get reimbursed for that employee. I'm making the motion. Ms. Newsom seconded the motion.

Motion carried, 5 – 0

(Vice Chair Jan Roberts had briefly stepped out of the meeting)

Ms. Reilly said, just following up on Mr. Knox's remarks about going off line from the ETMS System and returning to our Legacy Database system or MIS that would be I believe for the pre-apps submitted on and after October 1. What remains in the new system (ETMS) will remain and we will see those contracts throughout their life cycle. As Mr. Knox said, we will be playing in the sandbox, working very hard in the sandbox to determine what are the best features we can use going forward with an improved software solution for data management. I want to assure you, and we have discussed with executive staff, assure the stakeholders that your monitoring staff, our monitoring staff, and analysts will work with you to make sure there are no discrepancies in your contracts as generated from the new system, ETMS, and the Legacy system. We will work with you to even out any discrepancies as far as your performance standards and so forth. This will be going on throughout the active life cycle of your contracts.

The other very quick item, and this is mainly for the stakeholders, those of you who have contracts in the healthcare sector we are developing a new contract model for healthcare because of the fact that a lot of healthcare comes to us with multiple affiliated entities. This springs from the pattern over a decade now for the small community based hospitals to be purchased by a parent corporation that handles the administration and payroll is usually reported through the parent company CEAN. This is their only cost effective method to do business, healthcare costs or otherwise, and yet each hospital operates on its own and has its own formation as a limited liability corporation. Technically these are a group of employers. We want to recognize this and treat healthcare contracts separately with a new contract model that will recognize these affiliates. They can run as high as 12 affiliates under a Single Employer contract and also recognize there are special needs at retention they often qualify for a reduced work week. Nurses do not work an average of 35/hours a week, they

have varying schedules, they all qualify in the medical sector for non-customary jobs meaning the 500 hours and 272-day retention. There are other features in healthcare we want to recognize in an easy-to-use contract. This is just a tool and will be rolling out by October 1. We hope you enjoy it.

Mr. Broad said, let's take a short break and come back at 11:15 a.m. Thank you.

X. REVIEW AND ACTION ON PROPOSALS

Single Employer

Alta Los Angeles Hospitals, Inc.

Ms. Torres presented a Proposal for Alta Los Angeles Hospitals, Inc. (ALTA), in the amount of \$737,236. Founded in 1998, Alta is a division of Prospect Medical Holdings, Inc., that also operates Prospect Medical Systems in Santa Ana, CA; ProMed Healthcare Administrators in Ontario, CA; and the Nix Hospitals System in San Antonio, Texas. There are five Alta hospitals that will participate in this training proposal (Los Angeles, Van Nuys, Hollywood, Norwalk and Bellflower) wherein Los Angeles will be the lead hospital in facilitating training and administration for this ETP proposal. The Alta hospitals that are the subject of this training proposal serve ethnically diverse communities; patients are 95% Medicare/Medi-Cal with a large number of underinsured and uninsured.

Ms. Torres introduced Keith Levy, Administrator and Bill Parker, CEO of National Training Systems.

Mr. Broad said, based on our last discussion on healthcare, the documentation we have now allows us to see by job classification who is getting healthcare benefits applied. For example, at your East Olympic Blvd. facility, the 8 technicians are getting \$.04 an hour of health benefits being applied. This is not very much. It may not be any of them because the range of those employees is between \$22-\$39/hour so only somebody was actually at \$22 would even get the \$.04 right? I assume the next hourly wage level is more than \$.04 above \$22/hour. My first question to everyone is, how hard would it be to check at the end to see if everyone for whom you actually applied for this was getting at least that amount of health benefits, you were paying for it?

Mr. Levy said, HR said we could find out that information.

Mr. Broad said, pretty instantly?

Mr. Levy said, yes.

ACTION: Ms. Roberts moved and Ms. Newsom seconded approval of the proposal for Alta Los Angeles Hospitals, Inc., in the amount of \$737,236.

Motion carried, 6 – 0.

Infineon Technologies Americas Corp.

Ms. Torres presented a Proposal for Infineon Technologies Americas Corp. (Infineon), in the amount of \$568,248. Infineon was founded in 1947. Infineon designs and manufactures analog, digital and mixed signal integrated circuit boards, semiconductor and system solutions and other advanced power management products. The products enable high performance computing and energy savings in business and consumer applications.

Ms. Torres introduced Rose Aebig, Director of Learning and Development.

Ms. Roberts said, the previous contract was \$400,000, this one is for \$632,000. I am wondering why the big jump of \$250,000 that you're requesting. You did all of the transition with the international company you purchased with the last contract.

Ms. Aebig said, we mostly did the training with International Rectifier when it integrated with Infineon. We are now adding the Infineon locations and the number of locations have increased.

Ms. Roberts said, I see the seven locations are in your last contract. You're saying that none of those seven you have listed in your last contract were applied?

Ms. Aebig said, towards the end of the contract, but not until towards the end. We didn't do a lot of training in those locations. Most of the training was done at the Temecula site under the International Rectifier Company.

Ms. Roberts said, my main concern is that it looked like the same group of people.

Ms. Aebig said, no it's a different group of people.

Ms. Roberts said, thank you for the clarification. Going back to the health benefits it says that you pay \$4.25 for every employee per hour. You pay full health benefits for your employees?

Ms. Aebig said, we pay a portion of the health benefits for our employees.

Ms. Roberts said, \$4.25 seems like a high amount unless you pay full benefits for the employee.

Ms. Aebig said, we pay most of the benefits, there is a small employee contribution.

Ms. Roberts said, that's just for health benefits, not for bonuses or pension, just health benefits?

Ms. Aebig said, yes.

ACTION: Ms. Bell moved and Ms. Newsom seconded approval of the proposal for Infineon Technologies Americas Corp. in the amount of \$568,248.

Motion carried, 6 – 0.

PRL Glass Systems, Inc.

Ms. Torres presented a Proposal for PRL Glass Systems, Inc. (PRL) in the amount of \$514,666. Founded in 1989, PRL produces glass and aluminum building products such as doors, shower doors/sliders, handrails and curtain walls. The company also manufactures glass/aluminum table tops; laminated and glazed products; and provides sandblast detailing. Its customers include major architectural firms, commercial construction firms and residential remodeling firms.

Ms. Torres introduced Imelda Panol, Manager of Training and Gordon Kirkpatrick of KEI.

Ms. Roberts said, why did your contract increase \$200,000. What is different over your last contract?

Ms. Panol said, I would like to share good news. We just recently acquired two acres of property beside our building and we are expanding, we have more people and big competition in the market.

Ms. Roberts said, so the additional \$200,000 is for the 30 employees for job creation is that correct?

Mr. Kirkpatrick said, what they are facing now and what they were facing with the other contract is that there is an Irish company, a predatory company, who is attacking them. They are stealing employees, basically doing all they can to put them out of business. The last contract was primarily working very hard to train up our employees, what we found as you noticed, we went through the money very quickly. We are training extensively. We are trying to do everything we can (a) for customer service, and (b) to make sure our quality is higher and higher. We recognized we needed to do this, just to try and beat them off. They are under investigation for the predatory attacks. PRL is struggling, modernizing \$4M for equipment. They are a minority business doing all they can to try and stay alive. That's why we are coming back so quickly and that's why we are asking for more. We don't want to come back in a year. We would like to come back in two years if necessary. Hopefully, by that time they will have handled this problem. They just lost one of the key managers who was taken by this group. They are undercutting their business. It's not a friendly situation.

Ms. Roberts said, is Corning Glass one of your competitors?

Mr. Kirkpatrick said, no, Corning Glass is one of the suppliers. What's happening is this is architectural glass so whenever you see building and store fronts, that's the market and its hotels and things of that nature. The market is getting vastly undercut so they have to modernize, they have to take their employees up massive steps otherwise they can't compete. That's why we are coming back so rapidly so we can compete.

ACTION: Ms. Newsom moved and Ms. Roberts seconded approval of the proposal for PRL Glass Systems, Inc., in the amount of \$514,666.

Motion carried, 6 – 0.

Clean Energy Fuels Corp.

Ms. Torres presented a Proposal for Clean Energy Fuels Corp. (CLNE), in the amount of \$343,476. CLNE supplies Compressed Natural Gas (CNG) and Liquefied Natural Gas (LNG) for light, medium and heavy-duty vehicles, and provides operation and maintenance services for respective natural gas fueling stations. The company also designs, builds, operates and maintains fueling stations. In addition, CLNE manufactures, sells and services non-lubricated natural gas fueling compressors and other equipment used in CNG and LNG stations.

The company serves fleet vehicle operators in a variety of markets, including heavy-duty trucking, airports, public transportation agencies, government fleets, and industrial and institutional energy users. CLNE serves nearly 1,000 fleet customers operating over 45,000 natural gas vehicles, and owns/operates or supplies over 570 natural gas fueling stations in 42 states in the United States and four provinces in Canada.

CLNE has two facilities in Newport Beach and Long Beach. Both will participate in training.

Ms. Torres introduced Barbara Johnson, Vice President of Administration, Lacy Buckingham, Supervisor of Grants, and Chris Gate, Director of Operations.

Ms. Roberts said, I think it's a great contract and these are the kinds of contracts we like to approve especially first time contracts.

ACTION: Ms. Roberts moved and Mr. Robinette seconded approval of the Proposal for Clean Energy Fuels Corp., in the amount of \$343,476.

Motion carried, 6 – 0.

Mr. Broad indicated he received a text from the Governor's office and needed to leave. He handed over the gavel to Vice Chairwoman Roberts. (11:45 a.m.)

Orange County Global Medical Center, Inc.

WITHDRAWN

Triage Consulting Group

Mr. Mazzone presented a Proposal for Triage Consulting Group, in the amount of \$393,197. Founded in 1994 and headquartered in San Francisco, Triage Consulting Group (Triage) provides hospitals with comprehensive payment and audit review services. The company

works with hospitals to review their contracts with a variety of Health Maintenance Organizations (HMO) and Preferred Provider Organizations (PPO), Medicare, Medicaid State Compensation Insurance Fund, and other insurance plans. The company ensures that healthcare services are billed correctly for payment. If billings are incorrect or unpaid, the company will assist in recovery.

Mr. Mazzone introduced Danielle Crawford, Principal.

No questions from the Panel.

ACTION: Ms. Newsom moved and Mr. Koch seconded approval of the proposal for Triage Consulting Group in the amount of \$393,197.

Motion carried, 5 – 0.

Meyer Corporation, U.S.

Mr. Mazzone presented a Proposal for Meyer Corporation, U.S. (Meyer) in the amount of \$409,958. Founded in 1985 and headquartered in Vallejo, Meyer Corporation, U.S. (Meyer), develops, manufactures, and distributes kitchenware and cookware brands such as Farberware, Rachael Ray, Paula Deen, Circulon, and Anolon. The company targets retain consumers such as Walmart and Macy's.

Mr. Mazzone introduced Margo Davidson, Senior Human Resources Generalist and Meggie Chapman, Director of Grant Services – Economic Incentives Advisories Group.

No questions from the Panel.

ACTION: Ms. Newsom moved and Ms. Bell seconded approval of the proposal for Meyer Corporation, U.S. in the amount of \$409,958.

Motion carried, 5 – 0.

Multiple Employer Contracts

California Field Ironworkers Apprenticeship Training and Journeyman Retraining Fund – Northern California

Ms. Torres presented a proposal for California Field Ironworkers Apprenticeship Training and Journeyman Retraining Fund – Northern California (NorCal Ironworkers JATF) in the amount of \$530,465. The NorCal Ironworkers JATF seeks funding to train Journeyman, Apprentice, and Pre-Apprentice Ironworkers who primarily work in Solano, Contra Costa, San Francisco, San Jose, Fresno, and Sacramento counties. NorCal Ironworkers JATF operates training centers equipped with the newest training aids and technology in Sacramento, Fresno, San Francisco, San Jose and Benicia.

The training centers are a partnership created in collective bargaining between four International Brotherhood of Ironworker local unions (Local 118 in Sacramento, Local 378 in Benicia, Local 155 in Fresno, and Local 377 in San Francisco); and some 600 signatory employers. The four local JATCs sponsor three Ironworker apprentice programs as funded through the central trust. Journeymen will train at the San Francisco and San Jose sites while the Benicia, Sacramento and Fresno training facilities will provide a four-year, 800-hour apprenticeship program to apprentices.

Ms. Torres introduced Jason Rafter, Apprenticeship Coordinator; Jan Borunda, Cal Labor Fed Project Coordinator.

No questions from the Panel.

ACTION: Ms. Newsom moved and Mr. Knox seconded approval of the proposal for California Field Ironworkers Apprenticeship Training and Journeyman Retraining Fund – Northern California in the amount of \$530,465.

Motion carried, 5 – 0.

California Field Ironworkers Apprenticeship Training and Journeyman Retraining Fund – Southern California

Ms. Torres presented a Proposal for California Field Ironworkers Apprenticeship Training and Journeyman Retraining Fund – Southern California (SoCal Ironworkers) in the amount of \$511,010. SoCal Ironworkers seeks funding to train Journeymen and Apprentice Ironworkers in Southern California. SoCal Ironworkers has served the industry's training needs since 1946. A total of 4,907 Ironworker Journeymen work in the area. The central training facility is located in La Palma, where Journeymen and Apprentices from throughout Southern California attend training. A second training facility is located in San Diego.

The Training Centers are a partnership between three International Brotherhood of Ironworker local unions (Local 433 in the City of Industry and San Bernardino; Local 416 in Norwalk; and Local 229 in San Diego) and signatory employers. Each local acts as an apprenticeship program sponsor in partnership with signatory employers, under three separate Ironworker Joint Apprenticeship Training Committees created through collective bargaining. Each program is separately registered with the Division of Apprenticeship Standards (DAS).

Ms. Torres introduced Jason Rafter, Apprenticeship Coordinator; Jan Borunda, Cal Labor Fed Project Coordinator.

No questions from the Panel.

ACTION: Ms. Newsom moved and Mr. Knox seconded approval of the proposal for California Field Ironworkers Apprenticeship Training and Journeyman Retraining Fund – Southern California reducing the amount of

\$511,010.

Motion carried, 5 – 0.

Northern California Surveyors Joint Apprenticeship Committee

Mr. Mazzone presented a Proposal for Northern California Surveyors Joint Apprenticeship Committee (NCSJAC) in the amount of \$292,614. Established in 1975, the NCSJAC is the educational organization that provides Pre-Apprentice, Apprentice and Journeyman training services for union surveyors throughout Northern California. The NCSJAC is a labor-management committee comprised of representatives of the Operating Engineers Local Union 3 and the California and Nevada Civil Engineers and Land Surveyors Association, Inc. (Employers Association). It is funded under the Operating Engineers and Northern California Surveyors Pre-Apprentice, Apprentice, and Journeyman Affirmative Action Training Fund (Fund). The Fund is governed by a 12-member board, six designated by the union and six selected by signatory employers in the Association.

Mr. Mazzone introduced Joanie Thornton, Administrator, and Steve Duscha from Steve Duscha and Advisories.

No questions from the Panel.

ACTION: Ms. Newsom moved and Ms. Bell seconded approval of the proposal For Northern California Surveyors Joint Apprenticeship Committee in the amount of \$292,614.

Motion carried, 5 – 0.

San Francisco Electrical Industry Joint Apprenticeship and Training Trust

Mr. Mazzone presented a Proposal for San Francisco Electrical Industry Joint Apprenticeship and Training Trust (SF Electrical JATT) in the amount of \$614,000. Established in 1962, the SF Electrical JATT is a cooperative effort between the San Francisco Chapter of the National Electrical Contractors Association (NECA) and the International Brotherhood of Electrical Workers (IBEW) Local Union 6. SF Electrical JATT serves approximately 411 Apprentices and 1,626 Journeymen.

More than 180 employers contribute to the SF Electrical JATT and all are signatory to the collective bargaining agreement. Participating employers perform specialized construction work related to the design, installation, and maintenance of electrical systems in commercial, industrial and residential buildings. The JATT recruits and trains apprentices to meet the expanding and rapidly changing needs of San Francisco's electrical industry. Additionally, SF Electrical JATT provides skills update and improvement courses to Journeymen.

The JATT's training program keeps Journeymen and Apprentices technologically current in various fields including energy efficiency systems, computerized layout, and a new level of

infrastructure for energy systems and telecommunications. Electricians perform specialized construction work related to the design, installation and maintenance of electrical systems with more energy efficiency technologies than in previous years.

Mr. Mazzone introduced Pete Chursin, Training Director, and Jan Borunda, Cal Labor Fed Project Coordinator.

Ms. Roberts said, what are you going to do with Candlestick Point?

Mr. Chursin said, they have 6 high rises they are looking to build. There are other businesses that will go in there as well.

ACTION: Mr. Koch moved and Ms. Newsom seconded approval of the proposal for San Francisco Electrical Industry Joint Apprenticeship and Training Trust in the amount of \$614,000.

Motion carried, 5 – 0.

Santa Clara County Electrical Joint Apprenticeship and Training Trust

Mr. Mazzone presented a Proposal for Santa Clara County Electrical Joint Apprenticeship and Training Trust (Santa Clara JATT) in the amount of \$501,200. Founded in 1958, Santa Clara JATT is funded through collective bargaining between signatory employers that are members of the National Electrical Contractors Association (NECA) and the International Brotherhood of Electrical Workers Local 332.

Santa Clara JATT currently serves approximately 471 Apprentices and 1,665 Journeymen. The JATT sponsors two Apprenticeship programs: Electrician/Inside Wireman and Residential Electrician. Apprentices learn to work on electrical systems and component wiring, such as power distribution systems, electrical panels, conduit, piping, test equipment, transformers, motors, grounding, over-current protection, security, solar and home automations systems.

Mr. Mazzone introduced Robert Moreno, Training Director, Chap Power, Training Consultant, and Jan Borunda, Cal Labor Fed Project Coordinator.

No questions from the Panel.

ACTION: Ms. Bell moved and Ms. Newsome seconded approval of the proposal for Santa Clara County Electrical Joint Apprenticeship and Training Trust in the amount of \$501,200.

Motion carried, 5 – 0.

State Building & Construction Trades Council of California

Mr. Mazzone presented a Proposal for the State Building & Construction Trades Council of California (Council) in the amount of \$851,000. As an umbrella organization for union workers, Council represents more than 300,000 unionized construction workers in California. It has 175 affiliated local unions from 13 crafts and 22 county and multi-county Building Trades Councils. The Council works closely with the California Apprenticeship Coordinators Association which is the network of joint union-employer training programs or JATCs operating across the state. Council also consults with a wide range of employer organizations representing small businesses and major construction industry employers based in California. The construction industry to be served under this Agreement is designated as a Priority Industry by the Panel. Council meets ETP eligibility requirements as a trade association. In this proposal, Veterans have been introduced as a distinct cohort of Apprentice trainees.

Mr. Mazzone introduced Debra Chaplan, Director of Special Programs, and Jan Borunda, Cal Labor Fed Project Coordinator.

No questions from the Panel.

ACTION: Ms. Newsom moved and Ms. Bell seconded approval of the proposal for State Building & Construction Trades Council of California in the amount of \$851,000.

Motion carried, 5 – 0.

Sacramento Area Electrical Workers Joint Apprenticeship and Training Committee

Mr. Mazzone presented a Proposal for Sacramento Area Electrical Workers Joint Apprenticeship and Training Committee (Sac JATC) in the amount of \$749,736. Sac JATC was created through collective bargaining in 1941. Located in Sacramento, Sac JATC is dedicated to providing up-to-date industry skills that lead to high-quality job opportunities within the Electrical Industry. Sac JATC is comprised of four labor and four management representatives, as appointed by the International Brotherhood of Electrical Workers (IBEW) Local 340 for Labor; and the National Electrical Contractors Association (NECA) for Management.

Mr. Mazzone introduced Matt Nootenboom, Apprenticeship Trainer; Kimberly Woolsey, Administration and Jan Borunda, Cal Labor Fed Project Coordinator.

No questions from the Panel.

ACTION: Ms. Roberts moved and Mr. Robinette seconded approval of the proposal for Sacramento Area Electrical Workers Joint Apprenticeship and Training Committee in the amount of \$749,736.

Motion carried, 5 – 0.

Consolidated Disposal Service, LLC dba Republic Services (*Amendment*)

Ms. Torres presented an Amended Proposal for Consolidated Disposal Services, LLC dba Republic Services (Republic) in an additional amount of \$199,920. Republic provides solid waste collection, recycling, and disposal services. Republic provides services to 2,700 municipalities nationwide, including nearly 50 communities across Southern California. Customers include residential and commercial clients including single and multi-family unit residences, small businesses, healthcare facilities, retail establishments and construction sites.

Ms. Torres introduced Joanne Taylor, Human Resource Manager.

Ms. Roberts said, thanks for taking the right sizing of it originally, we appreciate that. We just want to make sure that your capable from an infrastructure standpoint. We have already approved this contract at one time. Do we have any further questions on the amendment? No further questions.

ACTION: Ms. Newsom moved and Ms. Bell seconded approval of the proposal for Consolidated Disposal Service, LLC dba Republic Services in the additional amount of \$199,920.

Motion carried, 5 – 0

XI. PUBLIC COMMENT

No public comments.

XII. MEETING ADJOURNMENT

Meeting adjourned at 12:06 p.m.

Reimbursement Rates – Review of Current Practice Tables

Type of Trainees/Proposal/Program	Class/Lab Productive Lab Instructor Led/Distance Learning	Advanced Technology Class/Lab	CBT
PROGRAMS/INITIATIVES:			
<i>Retrainee Job Creation Program</i>	\$20	\$20	\$8
AB-118 (ARFVTP) Program <i>Alternative and Renewable Fuel and Vehicle Technology Program</i>	\$18	N/A	
AB-118 (ARFVTP) Program Small Business <i>(100 or less employees in California but no more than 250 worldwide)</i>	\$26	N/A	
Apprenticeship Pilot Program			N/A
Apprentices	\$13	N/A	\$8
Pre-apprentice and Journeyman (Blended Rate)	\$22		
Ex-Offender/ At-Risk Youth	\$20		
CNA to LVN	\$18		N/A
Medical Skills (MST) preceptor	\$22		
Medical Skills (MST) didactic	\$22		
Seasonal Worker	\$15		
Veterans	\$22	\$22	\$8
Veterans Small Business	\$26	\$26	

Type of Trainees/Proposal/Program	Class/Lab Productive Lab Instructor Led/Distance Learning	Advanced Technology Class/Lab	CBT
NEW HIRE:	\$20	N/A	\$8
RETRAINING:			
Standard	\$15	\$22	\$8
Small Business <i>(100 or less employees in CA but no more than 250 worldwide)</i>	\$22	\$22	
MEC Entrepreneurial			
Priority Industry/Initiative Standard	\$18	\$26	
Priority Industry Initiative Small Business <i>(100 or less employees in CA but no more than 250 worldwide)</i>	\$26	\$26	
Priority Industry/Initiative MEC Entrepreneurial			
Critical Proposal <i>Note: In extenuating circumstances, a higher reimbursement rate may be considered.</i>	\$18	\$26	

Single Employer Contractor

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

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

These features apply to core program funding.

Multiple Employer Contractor

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

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

Retraining

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

New Hire Training

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

These features apply to core program funding.

Delegation Order Process

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

EMPLOYMENT TRAINING PANEL

STRATEGIC PLAN

2017-2018

STATE OF CALIFORNIA

ETP

EMPLOYMENT

TRAINING PANEL

THE EMPLOYMENT TRAINING PANEL

Barry Broad, Chairperson

Janice Roberts, Vice-Chairperson

Sam Rodriguez, Member

Edward J. Rendon, Member

Gloria Bell, Member

Panorea Avdis, Member

Gretchen Newsom, Member

Jeff Robinette, Member

Stewart Knox, Executive Director

Jill McAloon, Chief Deputy Director

Peter Cooper, Assistant Director

Maureen Reilly, General Counsel

Contents

A. Vision and Mission Statements.....	1
B. Introduction/Overview/Accomplishments	2
C. Goals and Objectives	3
D. Administrative Strategies.....	4
E. Economic Overview.....	7
F. Priority Industries.....	8
G. Workforce Trends.....	13
H. Strategic Initiatives	15
I. Strategic Alliances	19

Appendix

[Program Budget](#)

A. Vision and Mission Statements

Vision:

The Employment Training Panel (ETP) will support job creation and retention in California through strategic partnerships with business, labor, and government.

Mission:

ETP provides financial assistance to California businesses to support customized worker training to:

- *Attract and retain businesses that contribute to a healthy California economy;*
- *Provide workers with secure jobs that pay good wages and have opportunities for advancement;*
- *Assist employers to successfully compete in the global economy; and*
- *Promote the benefits and ongoing investment in employee training among employers.*

B. Introduction/Overview/Accomplishments

Introduction: Fulfilling Its Mission

Established in 1982, the Employment Training Panel (ETP) has proven itself for over 30 years as the state's premier program supporting job creation and retention through training. ETP is funded by a special tax on California employers. ETP differs from other workforce development programs whose primary emphasis is on pre-employment training. ETP fulfills its mission by reimbursing the cost of employer-driven training for incumbent workers and training needed by unemployed workers to re-enter the workforce. Overall, the ETP-funded training helps ensure California businesses have the skilled workers they need to be competitive.

Today, employers must be able to train workers in response to an increasingly competitive business environment. The need for workforce training of frontline workers who produce goods and deliver services is critical. Many employers have limited resources for training. ETP helps to fill this gap by funding training targeted to frontline workers.

ETP works because it is predicated on simple and effective principles:

- ***Employers make decisions about their training program.*** Employers are involved in every aspect of training. Companies assess their training needs, customize curricula accordingly, and implement and administer the training plan.
- ***Training investments help companies become more profitable.*** ETP-funded training promotes wage increases and requires employers to retain trained workers to earn training reimbursement.
- ***Employers are encouraged to assume greater responsibility for training.*** ETP reimburses training based on fixed-fee rates. Companies must cover the difference between ETP reimbursement and their actual training costs. As training costs increase, companies pay a larger percentage of the costs.
- ***Performance-based contracting helps to ensure success.*** A business may earn ETP funds only after a trainee completes all training and is retained for a minimum time period (normally 90 days) at a required wage.
- ***ETP funding is a catalyst for future workforce training.*** Employers who participate in ETP-funded training are more likely to invest in future workforce training. The ETP experience provides employers with practical knowledge and tools to successfully implement a training plan.

Overview of the Organization

ETP is organized under the Labor and Workforce Development Agency (LWDA) led by a Cabinet-level Secretary and encompassing ETP, the Department of Industrial Relations (DIR), the Employment Development Department (EDD), the Agricultural Labor Relations Board (ALRB), the California Workforce Development Board (CWDB), and the Public Employment Relations Board. ETP retains its autonomy as an agency

under LWDA, acting independently to disburse funds and set program policy. The LWDA promotes opportunities to collaborate and expand workforce training.

ETP is governed by an eight-member panel, seven of whom are appointed by the Governor and Legislative leaders. The eighth member is the Director of The Governor's Office of Business and Economic Development (GO-Biz) (or a designee) who serves ex-officio as a voting member.¹ The Panel approves training proposals, adopts program policies and regulations, and hears appeals.

Accomplishments

ETP reports annually to the Legislature and Governor's Office on prior year administrative improvements, including legislative and regulatory actions, contract activity, and progress toward ETP's strategic goals. ETP's Annual Reports are available on the ETP website.²

C. Goals and Objectives

Goal #1 Enhance the visibility of the Program

Objectives:

- a) Partner with public and private, State and local economic and workforce development organizations, including GO-Biz, to identify projects that demonstrate a direct economic impact to the State.*
- b) Partner with public and private stakeholders to increase outreach and raise awareness about the ETP program.*
- c) Educate legislative members and staff on the availability of training funds for their constituencies.*
- d) Continue to work with the Labor and Workforce Development Agency on labor workforce objectives in alignment with the Governor's office.*

Goal #2: Target California's key industries.

Objectives:

- a) Target program funds to ETP priority industries.*

Goal #3: Continue support for small businesses.

Objectives:

- a) Improve outreach to small businesses through partnerships.*
- b) Develop simplified contracting models for small businesses.*

¹ (http://www.etp.ca.gov/panel_members.cfm)

² <https://etp.ca.gov/about-us-2/annual-reports/>

Goal #4: Support Governor's initiatives and Hard-to-Serve populations.

Objectives:

- a) *Expand the Veterans Program.*
- b) *Expand services to workers with barriers to employment.*
- c) *Targeting training projects in the Central Valley region, rural California, Imperial Valley, and within High Unemployment Areas (HUA).*
- d) *Support pre-apprenticeship and apprenticeship programs.*
- e) *Support workers returning to/remaining in the labor market.*
- f) *Support green technology, training and jobs.*
- g) *Promote industry recognized certifications.*

Goal # 5: Enhance ETP's impact on job creation and retention.

Objectives:

- a) *Continue the Retrainee – Job Creation Pilot Program.*
- b) *Collaborate with GoBiz on critical proposals that increase job creation impacts.*

Goal #6: Increase the efficiency and effectiveness of the ETP program.

Objectives:

- a) *Deploy ETP's new data management information system to improve program efficiencies and to ensure comprehensive, seamless data collection and reporting.*
- b) *Conduct internal evaluation and assessment of program/contracting process.*
- c) *Partner with the Labor and Workforce Development Agency coordinating workforce services.*
- d) *Maximize funding through funding priority caps and allocations.*

D. Administrative Strategies

Process Improvement & Simplification

ETP has begun a process of comprehensively reviewing our policies with the goal of improving our processes and simplifying the more complicated areas of our program. This comprehensive review will help to make the ETP program more efficient, with improved workflows for staff and more straight forward and streamlined processes for our customers and stakeholders. We have already begun this work by reviewing our guidelines for our delegation order requirements, our reimbursement rate structure, the way health benefits are included in meeting our minimum wage requirements, and in our funding priorities. We will continue to review other areas of our program, including our wage requirement structure, the substantial contribution requirements, and non-traditional apprenticeship projects. Similarly, we will begin a review of all of our Pilots

and Guidelines with a view towards processes improvement and simplification. This streamlining process will greatly aid in the development of a new information management system, and will further help align ETP with the larger Labor Agency and related programs.

Maximizing Funds

The Panel maximizes funds based on available revenue, by adjusting funding caps, by establishing funding priorities, and by adjusting substantial contribution levels and high earner reductions.

Specific factors supporting FY 2017-18 funding recommendations are:

- Increase in Employment Training Tax (ETT) collections during FY 2016-17 that is likely to continue into FY 2017-18;
- Increase in the amount of prior FY project funding liability carried forward to FY 2017-18;
- Full appropriation of ETT revenue to the ETP program in the FY 2017-18 State Budget Act.

Funding Caps

Caps may be adjusted during the fiscal year based on revenue projections. Caps will be applied to projects as follows:

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

Funding Allocations

In order to more equitably distribute funds, the following allocations are applicable to different types of contracts:

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

Lowest Funding Priorities:

To support the Panel's goals/objectives, the Panel has designated the following as its lowest funding priorities:

- *Commission Sales in Retail Trade*
- *Multi-Level Marketing*
- *Training for employees of Training Agencies*
- *Adult Entertainment* - This includes the design, manufacture, distribution, servicing, management or sale of products or services in the adult entertainment.
- *Gambling*
- *Mortgage Banking* – This includes financial and collections institutes.
- *Car Dealerships*
- *Truck Driving Schools*
- *Partners in Professional Firms* – This includes legal, architectural, engineering, accounting, and tax advising firms.

Other limitations

- *Cannabis Industry Moratorium* – Since California has just passed legislation legalizing recreational marijuana in addition to medical marijuana use, the newly formed Bureau of Marijuana Control has not yet finalized licensing and other requirements. As such, a temporary moratorium on funding any Cannabis Industry company is in effect until the industry is more established, with regulations, licensure requirements and procedures in place, and with enough data available on industry statistics such as tax revenue, occupations, and industry growth to enable a more thorough analysis of the industry, to see if/how they will fit into ETP's program.
- *Support Costs* – Multiple Employer Contract (MEC) support costs will default to the highest percentage (8 percent of training costs for retraining and 12

percent for new-hire training). Applicants must justify the need for and amount of support costs, case-by-case.

- *Employer Demand in a MEC – MECs requesting funds for retraining must demonstrate participating employer demand for training, based on the MECs' prior performance. If prior performance is 80% or more, the MEC must demonstrate 60% demand. If prior performance is less than 80%, the MEC must demonstrate 80% demand.*
- *Substantial Contribution Levels - SC will default to the lowest percentage (floor). The Panel has flexibility to set levels on a case-by-case basis at a higher percentage (ceiling)*
 - *Floor: 15 percent first-time SC and 30 percent subsequent SC*
 - *Ceiling: 30 percent first-time SC and 50 percent subsequent SC*

E. Economic Overview

ETP supports job creation and retention in California through workforce training. Strategies for achieving this goal are based on current state of the economy, California's key industries, and workforce training trends. ETP coordinates with public and private sectors, leveraging funding to support the economy and workforce.

Statewide

The EDD Labor Market Information Division (LMID) reports that nine of California's major non-farm industry sectors gained jobs, while only two have lost jobs on a year-over basis ending in February 2017. The state saw gains in construction (2.2 percent); professional and business services (1.4 percent); leisure and hospitality (2.6 percent); information (3.1 percent); other services (2.3 percent); educational and health services (3.6 percent); trade, transportation and utilities (1.6 percent); financial activities (1.7 percent); and government (1.9 percent). The two non-farm sectors that showed a job decline in jobs as EDD LMID reports were mining and logging as EDD LMID reports (-11.2 percent), and manufacturing (-0.7 percent).³

California's non-farm payroll jobs experienced an increase of 22,900 jobs during the month of February, 2017, marking a seven-year employment expansion, adding a total of 2,489,500 nonfarm jobs over the past seven years. California's unemployment rate fell to 5.0 percent (seasonally adjusted) in February, 2017, which is the lowest unemployment rate in nearly ten years, since January, 2006, when it was 4.9 percent.⁴

On the subject of job growth, the Anderson Forecast cites multiple data sources that indicate continued economic growth for California. These sources include payroll and real income growth, as well as continued housing development.⁵

³ California Labor Market Review, <http://www.labormarketinfo.edd.ca.gov/Publications/Labor-Market-Analysis/calmr.pdf>

⁴ Ibid

⁵ <http://www.anderson.ucla.edu/media-relations/2016/ucla-anderson-forecast-looks-at-economic-growth-amid-presidential-elections>

Considering the above factors, the Anderson Forecast predicts total employment growth. Specifically, payrolls are forecast to grow by 1.7 percent in 2017, and 1.1 percent in 2018.

Regional

While most of California is experiencing strong economic recovery, some areas of the state continue to struggle with high unemployment. These are often rural, agricultural areas in the central and northern parts of California, such as Fresno County which in March 2017 reported a 10.3 percent unemployment rate⁶. In comparison, the unadjusted unemployment rate for California was 5.1 percent and 4.6 percent for the nation in the same period.⁷ Colusa County, in the rural, northern part of the State, reported the highest unemployment rate of 21.8 percent.⁸ ETP defines these high unemployment areas (HUAs) as distinct regions that have unemployment rates exceeding the State average by at least 15 percent. Still, some of the industries that are beginning to create and retain jobs during recovery (e.g., construction, educational and health services, information) are also present in the HUAs.

F. Priority Industries

ETP prioritized industries most vital to California's economic growth and recovery. Projects serving these industries receive a higher fixed-fee training reimbursement rate:

- [Agriculture](#)
- [Allied Healthcare](#)
- [Biotechnology and Life Sciences](#)
- [Construction](#)
- [Green/Clean Technology](#)
- [Goods Movement and Transportation Logistics](#)
- [Information Technology Services](#)
- [Manufacturing](#)
- [Multimedia/Entertainment](#)
- [Technical Services](#)

Agriculture – California is the nation's largest agricultural producer and exporter.⁹ In 2015, California exported approximately 26 percent of its agricultural production; these exports amounted to \$20.69 billion in value.¹⁰ Nearly 27 percent of California farms generated commodity sales over \$100,000, greater than the national average of 20 percent. The State's 77,500 farms and ranches received \$47.1 billion for their output;

⁶ [http://www.calmis.ca.gov/file/1fmonth/frsn\\$pbs.pdf](http://www.calmis.ca.gov/file/1fmonth/frsn$pbs.pdf)

⁷ Ibid

⁸ California Labor Market Review <http://www.labormarketinfo.edd.ca.gov/Publications/Labor-Market-Analysis/calmr.pdf>

⁹ http://www.cdfr.ca.gov/exec/public_affairs/pdf/CDFA_StrategicPlan2013-18.pdf

¹⁰ <http://www.cdfr.ca.gov/Statistics/>

this revenue was led by the dairy industry followed by almonds and grapes. California remained the leading state in cash farm receipts in 2015 with more than 400 combined commodities representing nearly 13 percent of the U.S. total. Over a third of the country's vegetables and two-thirds of the country's fruits and nuts are grown in California.¹¹

Allied Healthcare – Allied healthcare occupations generally support doctors and nurses. Many workers work at the bedside or behind the scenes to provide laboratory, imaging, and other critical services to diagnose and treat patients.

Healthcare is one of the state's highest growth industries. By 2050, California's population is projected to reach 50 million people.¹² An aging baby boomer population, coupled with the recent passage of the Affordable Care Act (ACA), means more people in need of care and less people to deliver it.

The Affordable Care Act now provides millions of Californians with health coverage, including rural and disadvantaged communities, where access to quality healthcare services can often be limited.

Many of those covered are foreign born. Thus, it's critical to provide relevant, regional training and education that prepares healthcare workers to deliver high-quality health services to diverse populations in all areas of the state.

Biotechnology and Life Sciences – California is a global leader in biotechnology and medical technology. It is home to multiple biomedical clusters located in the San Francisco Bay Area, Los Angeles, Orange County, and San Diego as well as in other counties throughout the state.¹³ California leads the nation with 3,040 biomedical companies employing close to 287,000 people, and earning \$147 billion in annual revenues.¹⁴ California also has the highest concentration of world class research institutions with an impressive 11 out of the top 100 universities in the world.¹⁵ Continued job growth is projected in biotechnology and life sciences. Additionally, the biotechnology industry is converging with green technology, conducting biological research relevant to renewable energy sources including the development of sustainable, cellulosic fuels (bio-fuels) for transportation and energy needs.

Construction – Since 2011, California's construction industry has steadily gained jobs, and growth is projected to continue at an annual average growth rate of 3.4 percent – the fastest growth rate among the major industry sectors¹⁶. Due to the improving housing market across the state, the construction industry is expected to gain 201,700 jobs between 2012 and 2022."¹⁷ According to the Employment Development Department's Labor Market Division the greatest concentration of job gains within the

¹¹ <https://www.cdfa.ca.gov/Statistics/PDFs/2015Report.pdf>

¹² Public Policy Institute of California, Just the Facts, California's Population, http://www.ppic.org/main/publication_show.asp?i=259

¹³ <http://califesciences.org/2017report/#anchor12>

¹⁴ <http://califesciences.org/2017report/#anchor3>

¹⁵ <http://califesciences.org/2017report/#anchor7>

¹⁶ California Industry Employment Projections Between 2012-2022, September 19, 2014, [http://www.calmis.ca.gov/file/indproj/cal\\$indnarr.pdf](http://www.calmis.ca.gov/file/indproj/cal$indnarr.pdf), Figure 4. Projected Employment Percent Change by Major Industry Sectors Between 2012-2022, pg. 3

¹⁷ Ibid, pg. 3

construction sector is projected to occur in building equipment contractors, building finishing contractors, and residential building construction.¹⁸

In recent years, federal stimulus funds and bonds have brought new transportation infrastructure investments, fueling high-priority transportation corridor improvements, trade infrastructure and port security projects, transit and passenger rail improvements, state and local partnership transportation projects, and improvements to streets, levees, and roads.¹⁹ Over the next ten years, labor needs for highway and transportation infrastructure improvements and nonresidential and public works projects will be a to support the demands of a growing population.

In 2012, voter approval of Proposition 39, the California Clean Energy Jobs Act, directed revenues for five years to eligible energy projects such as energy efficiency upgrades and clean energy generation at schools.²⁰ With the “greening” of the construction industry, opportunities are emerging in green construction jobs. Along with new construction projects there are many buildings being weatherized and retrofitted to achieve the Leadership in Energy and Environmental Design certification.²¹ Green construction occupations encompass all aspects of the building trades and provide opportunities for workers at various skill levels, from apprentice to journey-level. As California continues to lead the nation in the development of new technologies, renewable energy, and the sustainable design and construction of more efficient buildings, the demand for skilled workers in green building trades will continue to rise.

Green/Clean Technology – California is committed to increasing energy efficiency and the sustainable use of resources. The California Energy Commission’s Renewables Portfolio Standard (RPS) guides the State’s conversion of retail and public utilities to renewable sources. Since 2006, California’s Governors have set increasingly aggressive benchmarks demanding higher percentages of California’s electricity to be produced by renewable sources. In 2015, Governor Brown signed legislation requiring retail sellers and publicly owned utilities to procure 50 percent of their electricity from renewable resources by 2030²².

Innovative public policy addressing this commitment continues to promote the development of new green/clean technologies. Accordingly, California attracts 60% of the current clean-tech venture capital in the U.S., in industry sectors including sustainable agriculture, environmentally friendly manufacturing processes, transportation logistics, green building practices, and clean energy production²³. These green/clean technologies are creating new markets for products and services, are increasing business investment, expansion, and job creation, and are helping California reach our renewable resources goals. Green/clean technologies also provide the added benefits of improved air and water quality, reduced greenhouse gas emissions, healthier communities, natural resource conservation, and increased energy independence. The

¹⁸ California Industry Employment Projections Between 2012-2022, September 19, 2014, <http://www.calmis.ca.gov/file/indproj/calSindnarr.pdf>, Figure 4. Projected Employment Percent Change by Major Industry Sectors Between 2012-2022, pg. 3

¹⁹ California Department of Transportation/Strategic Growth Plan/Bond Accountability, <http://www.bondaccountability.ca.gov/>

²⁰ Office of Governor Edmund G. Brown Jr., Press Release 10-27-2014, <http://gov.ca.gov/news.php?id=18764>

²¹ Construction Careers, 2007, State of California, Employment Development Department, Labor Market Information Division, Information Services Group, Occupational Research Unit, <http://www.calmis.ca.gov/file/occmisc/constructioncareers.pdf>

²² CEC, <http://www.energy.ca.gov/portfolio/>

²³ https://www.gov.ca.gov/docs/Clean_Energy_Plan.pdf

Employment Development Department's (EDD) LMID estimates more than 500,000 Californians are currently working in the green economy. That number is projected to grow to 1.2 million by 2020. Clean energy jobs and businesses have grown much faster than the economy as a whole in the past fifteen years, and have continued to grow even during the economic downturn²⁴. As such, the green/clean industry sector is key to the continued health and growth of California's economy.

Goods Movement and Transportation Logistics – California supports one of the largest trade networks in the nation and serves as a major gateway for products entering and leaving the United States. In 2013, California exported \$168 billion in products – a 4 percent increase from 2012.²⁵ The State's economy and quality of life depend upon efficient delivery of goods to and from its ports and borders, with five major land ports of entry yielding over \$700 billion in economic activity, 11 seaports, and over 1,000 miles of coastline, international trade in California is an increasingly important component of the state's \$2 trillion economy.²⁶ Furthermore, California's freight transportation system directly supports a wide array of industries and commercial activities, including over 1.3 million freight-specific jobs throughout the State.²⁷

Each decade, millions of new residents join California's population, which will continue to increase over the next 20 years, and challenge existing infrastructure, including transportation and goods movement.²⁸

As California's goods movement industry expands and transportation logistics technologies advance, they will remain among the state's highest priorities and a source of high-wage jobs.

Information Technology Services – All industries must utilize advanced information technology to ensure competitiveness in the world-wide economy. For example, the agricultural industry is becoming "high tech" as it turns to sophisticated tools such as Geographic Information Systems (GIS) and Global Positioning Systems (GPS) to assist in growing crops.²⁹

In 2016, California continued its rank as the nation's leading cyber-state.³⁰ California ranked #1 in:

- High-tech employment of 1,186,470 workers, with 48,600 net jobs added from 2015 - 2016;
- Highest tech wages nationally, with annual average wage of \$154,000;
- High-tech payroll of \$182.7 billion;

²⁴ EDD LMID, <http://www.labormarketinfo.edd.ca.gov/>

²⁵ Senate Bill 1228 Trade Corridors Improvement Fund (2013-2014)

http://leginfo.ca.gov/faces/billNavClient.xhtml?bill_id=201320140SB1228&search_keywords=

²⁶ Investing in trade corridor is critical to job growth in San Diego, In My Own Words, Senator Ben Hueso, October 31, 2014

<http://sd40.senate.ca.gov/node/850>

²⁷ California Employment Development Department, Labor Market Statistics, Retrieved 12/8/2014;

<http://www.labormarketinfo.edd.ca.gov/Content.asp?pageid=1014>

²⁸ Public Policy Institute of California, <http://www.ppic.org/main/publication.asp?i=895>

²⁹ <http://www.caseyresearch.com/cdd/high-tech-heads-for-the-farm>

³⁰ <http://www.cyberstates.org/pdf/CompTIA%20Cyberstates%202017.pdf>

- High-tech businesses: 51,140, and;
- Highest Innovation Per Capita.

Information Technology Services is a fast-growing industry. Employment in computer systems design and related services will grow by 56.4 percent by 2024, according to the U.S. Bureau of Labor Statistics (BLS).³¹ The BLS projects excellent employment opportunities in the industry as demand for computer-related occupations increase with rapid advances in computer technology, continuing development of new computer applications, and the growing significance of information security.

Manufacturing – Manufacturing results in job creation. Growth in the manufacturing industry has a job multiplier effect that favorably impacts other industries. In 2009, following the lowest point in the recession and after a decade of steady declines in California manufacturing jobs (which dropped nearly 33 percent between 2000 and 2010), the rate of manufacturing decline began to slow. California began to experience a modest job gain due to consistently strong demand for California exports, which increased by 25 percent between 2009 and 2011.³² In April 2010, the manufacturing industry had the highest percentage of green jobs in California.³³ In fact, between 1995 and 2008, manufacturing in the green economy grew by 19 percent. In 2010, nearly 21 percent of California's green employment was in manufacturing.³⁴ According to GO-Biz, after more than a decade of consistent job losses, California posted three consecutive years of manufacturing job gains in 2011, 2012, and 2013.³⁵

Generating \$229.9 billion, California's manufacturing sector generates more manufacturing jobs than any other state. With manufacturing accounting for 11.7 percent of the total output and employing 9 percent of the state's workforce, California is the top state for manufacturing jobs and output in the country.³⁶

Multimedia/Entertainment – Multimedia/Entertainment and the motion picture industries remain a staple of the State's economy, providing high-wage, high-skill employment in jobs with significant multiplier effects on the economy, creating high-wage jobs which extend beyond the motion picture industry as an essential source of economic activity, tax revenue, jobs and tourism in California. This industry contributes \$50 billion dollars annually to our state's economy, supporting 145,000 well-paying entertainment industry jobs that provide health benefits.³⁷ California's multimedia and motion picture industry is becoming more competitive, projected to bring more filmmakers to the State in the upcoming years. Enacted in January 2015, the Film & Television Tax Credit Program 2.0 is a five-year program that increases funding from \$100 million to \$330 million. It is estimated to generate \$1.5 billion in direct in-state spending, including \$600 million in below-the-line wages.³⁸

³¹ <https://www.bls.gov/opub/btn/volume-5/the-high-tech-industry-what-is-it-and-why-it-matters-to-our-economic-future.htm>

³² California Governor's Office of Business and Economic Development

³³ <http://www.labormarketinfo.edd.ca.gov/contentpub/GreenDigest/2010-California-Green-Innovation-Index.pdf>

³⁴ http://www.energy.ca.gov/cleanenergyjobs/Select_Committee_on_Ca_Green_Economy_FinalReport_2010.pdf

³⁵ California Governor's Office of Business and Economic Development, 2014;

<http://business.ca.gov/WhyCA/CaliforniaEconomybytheNumbers.aspx>

³⁶ Ibid

³⁷ <http://www.lao.ca.gov/Publications/Report/3502>

³⁸ <http://film.ca.gov/wp-content/uploads/2017/02/CA-Tax-Credit-Progress-Report-10-27-2016-FINAL.pdf>

Technical Services – California, in particular the Silicon Valley, is home to many of the world's largest high-tech companies providing technical services to various industries. According to the Bureau of Labor Statistics (BLS), “the technical services sector comprises establishments that specialize in performing professional, scientific, and technical activities for others”.³⁹ Some major technical services industries include architectural services, engineering services, computer systems design, and research & development services. Architecture and engineering are driven by residential and commercial construction activity, as well as by corporate and government spending. In 2016, California reported over 326 thousand people employed in these industry sectors, the highest employment level compared to other states in the nation⁴⁰. Civil engineering also continues to demonstrate growth, with the BLS projecting civil engineering employment to increase nationally at a faster-than-average rate of 8 percent over the decade ending in 2024.⁴¹ The California Employment Development Department (EDD) estimates a 12.2 percent increase in civil engineering employment in California over the same time period.⁴² Environmental consulting and green businesses are creating jobs at a faster pace than the broader economy. According to the Environmental Defense Fund, approximately 300 businesses in over 400 locations across California are responsible for growing the state’s clean transportation sector.⁴³

G. Workforce Trends

The Workforce Innovation and Opportunity Act (WIOA) – Established in 2014, WIOA reauthorizes/ restructures the workforce system implemented by the Workforce Investment Act of 1998. The new system will better align education, economic, and workforce programs and services; better support regional economic development and labor markets; train more unemployed workers for higher-wage, higher-skill job opportunities; expand registered apprenticeships; provide more robust business services including expanding On-the-Job, Incumbent Worker, and Customized Training; support sector strategy and career pathway programs; and increase and refine services to a variety of targeted populations such as Veterans and people with disabilities. Under federal WIOA law, local boards are allowed to spend up to 20% of their funds on incumbent workers. A participant in the WIOA system, ETP supports the vision and goals for WIOA established by the Governor.

Retirees – Retirees, along with individual’s eligible for retirement, are among those workers for whom up-skill or re-skill training may be necessary. Many in the “baby boomer” generation are continuing to work rather than retire, or are attempting to return to work due to economic conditions. Older workers who want to remain in or re-enter the workforce constitute only one among numerous special populations that represent a sizeable percentage of the current and future labor force. DOL programs, for instance, prioritize services to low income adults, at-risk youth, people with disabilities, authorized

³⁹ <http://www.bls.gov/iag/tgs/iag54.htm>

⁴⁰ <http://www.bls.gov/oes/current/oes170000.htm>

⁴¹ <http://www.bls.gov/ooh/architecture-and-engineering/civil-engineers.htm>

⁴² <http://www.labormarketinfo.edd.ca.gov/OccGuides/Detail.aspx?Soccode=172051&Geography=0601000000>

⁴³ http://www.edf.org/sites/default/files/content/01_edf_green_roads_map_overview.pdf

immigrants, and other populations that are underserved or have multiple barriers to employment.

Veterans – Employment and training services for veterans is a focus for the State and its workforce system. A United States Department of Veterans Affairs study finds that 18 percent of veterans who sought jobs within one to three years of discharge were unemployed, while one out of four who did find jobs earned less than \$21,840 a year. ETP currently serves veterans in its training population, (see [Strategic Initiatives](#) section) and supports training to assist veterans and members of the National Guard entering the workforce seeking opportunities for advancement in high-wage secure jobs.

Middle-Skill Workers – The trend of serving special populations with public workforce funding continues, as does the trend toward the re-employment of skilled workers and up/re-skill training for incumbent workers. The investment of state and federal funds in workforce training continues to become more limited and strategic – targeting priority industries, occupations, and populations.

There is also a trend toward growth in jobs that require more than a high school, but less than a college education. These jobs, referred to as “middle-skill,” represent approximately nearly half of the jobs in California,⁴⁴ while only about one third of California’s workers have the necessary training for them. Many of the middle-skill occupations such as medical lab technician, heating and air conditioning installer, emergency medical technician, and plumber fall into the Career Technical Education (CTE) category of training and education. Many middle-skill jobs are also accessible through apprenticeship training.

Automation and the Contingent Workforce – The trend toward increased automation of the workplace, the use of contingent labor, and the expansion of the gig economy is expected to continue and accelerate. Automation, robotics, and artificial intelligence are predicted to play a larger role in the workplace and perform not only physical work but also cognitive tasks. While few jobs will be entirely replaced by automation in the near future, a great many jobs may have specific tasks impacted by this trend. According to a recent report by McKinsey & Company, about 60% of occupations have at least 30% of their activities that are automatable.⁴⁵

Sector Strategies – Sector strategies continue as a workforce training trend. The California Regional Economies Project (CREP) developed a methodology for economic development partners to identify and assist industries and businesses vital to their regional economies in meeting workforce needs, and to assist communities in preparing underserved populations for careers. The CWDB is also pursuing sector strategies at the state level through special committees and workgroups, such as the Green Collar Jobs Council and the Advanced Manufacturing Workforce Development Council. Working closely with ETP, the CCCOC, the California Department of Education (CDE), and other agencies, the CWDB is developing programs that support sector-strategy based career pathways throughout the state. The work of WIOA partners is accelerating

⁴⁴ “Can California Compete?” by America’s Edge, June 2012. <http://cdn.americasedge.org/clips/CAAESkillsReport-5.pdf>

⁴⁵ <https://www.mckinsey.com/global-themes/digital-disruption/harnessing-automation-for-a-future-that-works>

as California implements the new system. For instance, CWDB's Slingshot initiative is aimed at accelerating income mobility through regional collaboration and resolving regional employment challenges that slow California's economic engine. The initiative will seed regional collaborative efforts by employers and industry, government, workforce and economic development agencies, and education stakeholders within regions. ETP is a partner in this sector strategy.

ETP is legislatively mandated to coordinate its program with local workforce investment boards, the CWDB, and other partners in the Workforce Investment Act (WIA), and going forward, WIOA, to achieve an effective and coordinated approach to the delivery of the state's workforce resources.

ETP partners with LWDA, GO-Biz, CWDB, EDD, the CCCCCO, CEC, and others at the State and local levels in coordinating resources and services to assist industries, businesses, and citizens having a positive impact on California's economy. ETP continues to expand its program and services in response to the dynamic economy by 1) seeking new partners with whom to collaborate, such as CEC, Office of the State Treasurer and local workforce investment boards, and 2) leveraging additional resources, such as WIOA Discretionary or AB 118 funding.

H. Strategic Initiatives

ETP plays an important role in California's workforce system, assisting businesses to provide lifelong learning opportunities to workers. Historically funded by employers, incumbent worker training is increasingly becoming a focus for public workforce funding. ETP targets business and industry vital to economic recovery and growth, training in HUAs, and training for lower income workers and individuals with barriers to employment. ETP continues to expand its historical training role, coordinating the investment of alternative funding for workforce training in California businesses.

As a long-term partner supporting job creation and retention through training, ETP coordinates its efforts within its core program and partners with other State agencies in the design and delivery of services via alternatively funded programs. ETP has developed key partnerships with the CEC, EDD, LWDA and other labor and workforce organizations. ETP's partnerships with the LWDA and the EDD have resulted in allocation of WIOA (formerly WIA) Governor's Discretionary and other alternate funds to ETP.

ETP's role in the State's workforce system continues to evolve as the program responds to changing economic and workforce needs, creating new initiatives and pilots focused on job creation, workforce training, and overall economic recovery and revitalization.

Healthcare

The Employment Training Panel's commitment to train professionals in the healthcare field remains strong. ETP participates in the CWDB's Health Workforce Development Council (HWDC). The Council is tasked with understanding workforce needs of the health industry.

Addressing Climate Change

California continues to lead the nation in the development and implementation of policies promoting secure, clean, affordable energy while protecting the environment, conserving natural resources, and supporting the development of green technologies. California has continued to reduce greenhouse gas emissions and remain at the forefront of innovation while stimulating new markets and creating new jobs.

As early as 1947, California began to adopt and implement innovative policies aimed at reducing pollution and protecting air quality.⁴⁶ For decades, California's approach to emissions reductions has broadened significantly, permeating various sectors from transportation and electricity generation to agricultural production and residential uses. The shift toward a low carbon economy has naturally led to technological advancements and investment in transportation and renewable energy.

In recent years, numerous initiatives have continued to shape California's leadership role in the development of green technologies, including California's Renewable Portfolio Standard (RPS). Created in 2002 and expanded in 2015, RPS establishes some of the most ambitious renewable energy standards in the nation: the California Global Warming Solutions Act of 2006 (AB32) which established greenhouse gas reduction targets to 1990 levels by 2020; the adoption of green building codes and the establishment of the Green Collar Jobs Council in 2008; Governor Brown's Clean Energy Jobs Plan in 2011, and; the Governor's updated 2016 Zero Emission Vehicle Action Plan.

On April 29, 2015, Governor Brown signed Executive Order B-30-15 which establishes California's greenhouse gas reduction target at 40 percent below 1990 levels by 2030. This is the most aggressive benchmark enacted by any government in North America to reduce dangerous carbon emissions over the next decade and a half and paves the way toward reaching the state's ultimate goal of reducing emissions to 80 percent below 1990 levels by the year 2050.⁴⁷ In July of 2017, Governor Edmund G. Brown Jr. signed AB 398 by Assembly Member Eduardo Garcia (D-Coachella), which extends and improves the state's world-leading cap-and-trade program to ensure California continues to meet its ambitious climate change goals.

Innovation continues to drive the state's progress in developing and implementing clean technology products and services. With an economy ranked amongst the most efficient and least carbon intensive in the world, California continues to drive growth in the clean economy, generating economic benefits while protecting air quality and natural resources. Between January 2002, and January 2012, jobs in California's Core Clean Economy grew by 20 percent, faster than the economy as a whole.⁴⁸ As California continues to transition to a low-carbon economy, the Employment Training Panel supports training in the economy's clean technology sectors. ETP will work to ensure the development of a highly-skilled workforce equipped to meet the needs of 21st century.

⁴⁶ California Green Innovation Index, 6th Edition, 2014, Next 10, <http://www.next10.org/2014-california-green-innovation-index>

⁴⁷ Office of Governor Edmund G. Brown Jr., Press Release 4-29-2015, Governor Brown Establishes Most Ambitious Greenhouse Gas Reduction Target in North America, <http://gov.ca.gov/home.php>

Alternative Renewable Fuel Vehicle Technology Program (ARFVTP)

Created in 2007 and administered by the California Energy Commission, the ARFVTP provides workforce training in new transportation technologies to help address the workforce needs of companies engaged in the development or deployment of alternative fuels and vehicle technologies.

The overall goal of AB 118 is to transform California's fuel and vehicle types to meet the state's climate change policies. ETP's partnership with the California Energy Commission, which began in FY 2009-10, was established to implement a training program via an Interagency Agreement (IA) in alignment with the overall goals and objectives of AB 118.

In FY 2015-16, the Energy Commission approved an Interagency Agreement to provide ETP with an additional \$2 million effective beginning July 1, 2016. Due to the additional AB 118 funds, the total CEC Energy Commission approved IA funding amount is \$11.5 million.

In FY 2017-18, ETP will continue to receive ongoing reimbursable authority of \$3 million based on historic grant awards and expenditures. This ongoing appropriation in reimbursable authority allows ETP to allocate AB 118 funds on a timely basis each fiscal year to contracting entities. ETP continues to participate on the Governor's Interagency Working Group on Zero Emission Vehicles as part of this strategic initiative.

Career Technical Education (CTE)

Intended to prepare workers for the 21st Century economy, Career Technical Education (CTE) programs are designed with jobs in mind. By successfully matching the skills of the emerging workforce with the needs of California's highest growth industries, high-quality programs provide hands-on, industry-specific training for careers in high demand.

The fastest growing fields requiring a vocational associate's degree will require CTE training. LMID estimates that from 2010 to 2020 California will see an increase in occupations, including: computer and mathematical occupations; healthcare practitioners and technical occupations; healthcare support occupations, and; construction and extraction occupations, including carpenters and plumbers.⁴⁹

High-quality, coordinated programs provide an essential link between those preparing the workforce and those employing the workforce. CTE programs help close the skills gap, fuel a stronger economy, and maintain California's competitive edge at the forefront of the global marketplace. As California's economy continues to evolve and keep pace with economic changes throughout the nation and the world, a highly-skilled workforce will remain a fundamental factor in California's continued economic prosperity.

⁴⁹ LMI for the State of California Occupational Projections: <http://www.calmis.ca.gov/htmlfile/county/califhtm.htm>

Apprenticeship Training Program

Initiated in 2012, ETP's Apprenticeship Training Program provides funds for apprenticeship classroom training. During its first five years, from 2012 to 2017, the program provided nearly \$60 million in 135 contracts to train over 36,000 trainees. ETP funding allows Joint Apprentice Training Committees (JATCs) or other program sponsors to supplement limited state Montoya Funds for the Related Supplemental Instruction (RSI) portion of training. The program funds up to 200 hours of RSI training, plus 10 hours of OSHA10 training for apprentices in their second year and beyond. ETP also funds Pre-Apprenticeship and Journeyman training

ETP participates on the LWDA Apprenticeship Task Force and works with state partners to expand the Apprenticeship model to new, non-traditional industry sectors, such as manufacturing and healthcare. ETP also coordinates with two other government programs specific to apprenticeship funding:

- As part of a nationwide effort, the federal Department of Labor released grant funds for apprenticeships in September 2016. The state Department of Industrial Relations was awarded \$1.8 million to fund "California's Future" aimed at expanding apprenticeship programs overall with an emphasis on non-traditional and "diversity" enrollment over a 10-year grant cycle. Key partners include the California Workforce Development Board, the State Building and Construction Trades Council, CalFED and ETP.
- Under the Governor's Budget, funds were appropriated from the General Fund over two Fiscal Years (ending in FY 2016/17) for the California Apprenticeship Initiative (CAI). The grants were released in two-year cycles, with the most recent award at \$15 million. This funding is dedicated to new, non-traditional apprenticeship and pre-apprenticeship programs, primarily through the California Community College Chancellor's Office. ETP will support these programs in contract with the community college system after the CAI funding is exhausted.

Support for Veterans

The need for employment training for veterans is increasing due to the number of active and reservist personnel who have performed military service in recent years. ETP funds training to help veterans pursue high-skill, high-wage jobs. ETP provides incentives such as increased training reimbursement rates for contractors who prioritize training for veterans. ETP will continue to partner with other state agencies, through the California Interagency Council on Veterans (CICV), to develop initiatives for the training and employment of veterans and will increase outreach to veteran organizations to develop training projects that serve veterans.

ETP will continue working with local chambers, business groups, and public agencies, and participating in conferences, job fairs and community workshops.

Serving Small Business

Small employers with fewer than 100 employees (3.7M businesses) represent 99.2 percent of all employers in the state and employ 49.6 percent of all California workers.⁵⁰ ETP prioritizes funding for small business: funding training for small business owners, equipping them with tools needed to run a business, and funding training for employees to provide them with critical job skills. ETP incentivizes training for businesses with 100 or fewer employees in California (and 250 or less worldwide) providing an expedited contracting process and a higher training reimbursement rate.

ETP participates on the Small Business Advocate Intergovernmental Advisory Council to GoBiz, which joins staff and resources from various state agencies to share information and streamline policy for small business. The Council increases awareness of small business needs; the effects of regulatory, financial, political and economic environments on small business, and; the impact of small business on jobs and the economy. ETP has also participated in a series of statewide presentations with the Governor's Small Business Advocate in coordination with the US Small Business Administration; with the California Small Business Development Centers' and; at regional Small Business Summits provided by the US Small Business Administration and the California Public Utilities Commission.

I. Strategic Alliances

Marketing

The Employment Training Panel markets to priority industry employers and employers supporting traditionally under-served training populations. ETP will also diversify its marketing efforts for priority industry employers and initiatives directly supporting workforce and economic development. These marketing efforts will increase the number of marketing partners working to target applicants for funding and bring new training proposals to the Panel.

Apprenticeship Training Program

ETP is coordinating with the California Labor Federation and the State Building and Construction Trades Council, as well as other interested union and non-union partners, to continue the Apprenticeship Training Pilot Program. Through this partnership, the Labor Federation and the State Building Council assist ETP in marketing the program among JATCs. ETP continues to work closely with the Division of Apprenticeship Standards and participate in the LWDA Apprenticeship Taskforce. For more information on the program, see [Introduction](#) and [Strategic Initiatives](#) sections.

Governor's Interagency Working Group on Zero-Emission Vehicles

ETP participates on the Governor's Interagency Working Group on Zero-Emission Vehicles, which is coordinated by GO-Biz. In 2012, Governor Brown issued Executive

⁵⁰ https://www.mbda.gov/sites/mbda.gov/files/migrated/files-attachments/California_2016.pdf

Order B-16-12 directing state government to help accelerate the market for zero-emission vehicles (ZEVs) in California. This Executive Order calls for 1.5 million ZEVs in California by 2025 and establishes several milestones on the pathway toward this target. The working group helps identify and coordinate specific actions by state government to meet the milestones of the Executive Order. ETP supports job training in this sector with CEC funds from the ARFVTP program and advises the working group on workforce development policy.

Job Creation and Retention

ETP develops projects in partnership with other governmental entities and funding sources. ETP works with GO-Biz on Critical Proposals with an emphasis on creating new jobs in California. ETP also supplements state funding for training under an approved apprenticeship program and adult education. ETP supports job creation and retention in partnership with state and local economic and workforce development partners.

State and Local Workforce Development Boards

The California Workforce Development Board (CWDB) assists the Governor in setting and guiding workforce development policy.

In 2014, CWDB approved the creation of the Workforce Innovation and Opportunity Act Implementation Work Group to oversee the implementation of the Workforce Innovation and Opportunity Act (WIOA). The WIOA is designed to help job seekers access employment, education, training, and support services in order to succeed in the labor market.

Consisting of an executive-level membership representing various organizations and state boards involved in workforce services, education, and training, the WIOA Implementation Work Group has been tasked with the development of WIOA performance measures and multi-agency metrics, policies, systems alignment and regional collaboration, and the determination of governance changes.

The Panel participates in the WIOA Implementation Work Group to better coordinate State efforts and funds aimed at strengthening California's economic infrastructure, increasing the efficiency of State programs to better target under-served industry sectors.

Rural and High Unemployment Areas

The areas of highest unemployment continue to be rural regions of the state, including the Central Valley, San Joaquin and Imperial Valley. These areas trail the rest of the state in family income, educational achievement, healthcare access, employment, and job stability. Unemployment rates in these regions have been persistently high, even prior to the economic down-turn of the last few years.

ETP funds training for companies in HUAs to stimulate local economies. Funding targets workers who have full-time jobs and fairly stable employment but earn low wages and

lack job skills necessary to improve their employment. The Panel also serves populations with multiple barriers to employment in HUAs.

ETP incentivizes training in HUAs (areas with unemployment rates at least 15% higher than the state average), waiving some of its standard program criteria to provide flexible retention and lowered wage requirements.

DRAFT

Program Budget

ETP is funded principally by the Employment Training Tax (ETT) which California companies pay to promote the development of an improved workforce. The tax revenue is collected by the EDD Tax Collections Branch and deposited into the Employment Training Fund (ETF). The Budget Act of FY 2017-18 appropriates \$82.1 million to the ETF. Considering ETF expenditures for the EDD Tax Collections Branch, the Financial Information System for California (FI\$Cal) Project, Pro Rata Assessment, and ETP's estimated \$5.0 million in available program funds for reinvestment in new training projects – ETP will have close to \$80.2 million available for the current fiscal year. Given ETP's prior-year obligations (\$31 million) and planned program expenditures (\$11.6 million), ETP will have \$36.1 million available to fund new core contracts in FY 2017-18.

FY 2017-18 Core Program Revenue & Expenditures

The following table illustrates the projected ETF and ETP revenue and expenditures for FY 2017-18.

ETF Budget Act Appropriation ⁵¹	\$82,124,000
<u>Budget Act--ETF Expenditures:</u>	
Program 21: EDD Tax Collections Branch	(\$5,821,000)
FI\$Cal Project ⁵²	(\$96,000)
Pro Rata Assessment	(\$971,000)
Remaining ETF Balance:	\$75,236,000
ETP Program Funds Reinvested (Estimated) ⁵³	\$5,000,000
ETF Budget Act Appropriation ⁵⁴	\$82,124,000
<u>Budget Act--ETF Expenditures:</u>	
Program 21: EDD Tax Collections Branch	(\$5,821,000)
FI\$Cal Project ⁵⁵	(\$96,000)
Pro Rata Assessment	(\$971,000)
Remaining ETF Balance:	\$75,236,000
ETP Program Funds Reinvested (Estimated) ⁵⁶	\$5,000,000
Amount Available Fiscal Year 2017-18:	\$80,236,000

⁵¹ Cannot exceed Governor's Budget Act Appropriation.

⁵² FI\$Cal Project is a business transformation project for state government in the areas of budgeting, accounting, procurement, and cash management..

⁵³ Program fund cash balances from closed and terminated prior year contracts are subsequently disencumbered and reinvested for use in the current year, per Provision 1 of the State Budget Act.

⁵⁴ Cannot exceed Governor's Budget Act Appropriation.

⁵⁵ FI\$Cal Project is a business transformation project for state government in the areas of budgeting, accounting, procurement, and cash management..

⁵⁶ Program fund cash balances from closed and terminated prior year contracts are subsequently disencumbered and reinvested for use in the current year, per Provision 1 of the State Budget Act.

ETP (Planned) Program Expenditures:

Program Administration	(\$11,675,642)
EDD Support	(\$500,000)
Marketing and Research	(\$200,000)
Employment Training Management System	(\$760,358)
Prior Year Program Fund Obligations (Estimated)	(\$31,000,000)

Training Funds Available: **\$36,100,000**

Projected Contracting Capacity **\$95,000,000**

Allocations by Category

As indicated in the funding table on the preceding page, the ETP (Planned) Program Expenditures are budgeted within the following categories:

- 1) **Program Funds:** As a result of ETP's incremental funding process, obligations in prior year contracts account for \$31 million of the \$75.2 million in available program funds, leaving \$36.1 million available for new training projects after all other planned expenditures are allocated. However, through the incremental funding process this will yield close to \$95.0 million in total contract value.

ETP available program funds are used to off-set the costs of training for incumbent workers and unemployed workers under two categories:

- a) **Job Creation and Job Retention** – Most projects are approved under this category, primarily to support retraining of incumbent workers. Some funds under this category are allocated in support of training for unemployed workers (i.e., "New Hires").

Job Retention: Retraining programs train incumbent, employed individuals in companies that are facing out-of-state competition and need to retrain their employees to improve the business' competitiveness.

Job Creation: New Hire training programs train unemployed individuals who are currently receiving unemployment insurance benefits or have exhausted their benefits within the last two years. Training is in job skills needed for a specific occupation or

- b) **Special Employment Training (SET)** – Up to 15 percent of ETP's annually available training funds are available under this category. The purpose of SET is to fund training projects to improve skills and employment security of frontline workers in projects that do not meet standard eligibility requirements, but are a priority for workforce training. SET projects target frontline workers (i.e., those workers directly producing goods or services) earning at least the State average wage. SET funding also allows training of frontline workers who earn less than

the State average, if they are in HUAs, have multiple barriers to employment, are small business owners, or are seasonal workers.

- 2) **Marketing and Research**: \$200,000 for marketing and outreach, which are driven by ETP's priorities and the need to reach businesses that have the most impact on the California economy.
- 3) **EDD Support**: \$500,000 to support general communications, budget and accounting, business operations, human resources, legislative analysis, information technology, and coordination activities on behalf of ETP.
- 4) **ETMS**: \$760,358 for the design, implementation, and replacement of the existing ETP Management Information System. This amount also includes ongoing maintenance costs
- 5) **Program Administration**: \$11,675,642 for operational costs, which includes personal services and benefits, operating expenses and equipment.

In addition to receiving ETF core program funding, ETP will receive the following alternative funds:

Alternative Funding in FY 2017-18, the Energy Commission will allocate \$3.0 million to fund AB 118 ARFVTP training contracts via an Interagency Agreement

General Funding in FY 2017-18, Assembly Bill No. 1656 will appropriate \$3.0 million to establish a grant award program to fund training programs for certified nurse assistants by interested and qualified applicants, as specified.

The Strategic Plan was prepared by the Planning and Research Unit staff: Jeff Brooks, Madison Hummel, Bryan Lytle, Mario Maslac, Tiffany Maslac, Leo Melton, John Saunders, Elisabeth Testa and Nancy Tran

The Strategic Plan is available on-line at the Employment Training Panel's website:
<http://www.etp.ca.gov/>

The Employment Training Panel (ETP), a recipient of state funds, is an equal opportunity employer/program and is also subject to Section 504 of the Rehabilitation Act and the Americans with Disabilities Act (ADA).

Individuals with disabilities who would like to receive the information in the publication in an alternate format may contact ETP at (916) 327-5640.





TRAINING PROPOSAL FOR
ANCHOR HEALTHCARE, LLC
18-0501

Panel Meeting Date: 10/27/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Margarita Paccarelli
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: \$249,964.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$249,964.00	N/A	\$0.00	\$340,000.00

APPLICANT PROFILE

Company Summary	Anchor Healthcare, LLC dba Oxford Healthcare (Anchor) provides residential healthcare services for families throughout Southern California. The Company delivers a wide range of health care services including patient and caregiver education, intravenous and nutrition therapy, injections, and serious illness monitoring.
------------------------	---

Industry Sector(s)	Healthcare		
Priority Industry	Yes		
No. of Employees (Applicant)	State: 109	US: 109	World Wide: 109
Turnover Rate (Applicant)	5.00 %		
Repeat Contractor	No		
High Unemployment Area	No		
Unions	No		

TRAINING PROFILE

Training Objective	Anchor's training objectives are as follows: <ul style="list-style-type: none">• New RNs and LVNs, will gain experience working with patients in a supportive environment with preceptor and experienced health care professionals as mentors.• Proficiency in triage as needed for patients with complex health care needs.• Develop leadership abilities to manage rapidly changing situations in patient care.
---------------------------	---

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	88	\$20.00	140	\$2,800	8 - 200
2	Retrainee	9	\$18.00	22	\$396	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1967 and located in Long Beach, Anchor provides the professional and compassionate home health care services in Southern California. The Company provides virtually every medical procedure that does not require hospitalization in the comfort of the patient's home.

This will be Anchor's first ETP Agreement.

2. Current Training Project Details

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

Purpose of Training	<p>Anchor is requesting training funds in response to multiple changes in training associated with the implementation of the Affordable Care Act (ACA) and the Centers for Medicare and Medicaid Services Quality Strategies (CMS) which will last through 2018. Although there has been discussion of repealing some aspects of the ACA, it is unlikely to be repealed in its entirety; particularly initiatives pertaining to quality of healthcare that are tied to reduced costs. For some time now, acute care hospitals have been transformed through the ACA and CMS regulations to deliver better care at lower cost and those changes are continuing in the home health industry.</p> <p>The proposed training will also help Anchor adapt to rapidly growing percentage of an aging population with higher acuity patient demands. The Company has committed to hiring and training 88 "net" new jobs for Registered Nurses and Licensed Vocational Nurses. The training will focus on nurse skills that will provide effective care, reduce hospital readmissions, and meet quality standards. The proposed training will also retrain current Administrative Staff in skills that will positively impact the overall quality of the healthcare system.</p>
Training Infrastructure and Administrative Plan	<p>Anchor's Director of Human Resources will oversee training and project administration. The Company has several in-house experts to provide training. In addition, Anchor has retained an outside administrative consultant to ensure that all training records meet ETP compliance.</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 Class/Lab Computer, Continuous Improvement. Only Nursing staff will receive Medical Skills (Didactic) training.	

Delivery Method/Level	Productive Laboratory
Summary	
Registered Nurses and Licensed Vocational Nurses will received Medical Skills Clinical Preceptor training to demonstrate efficiencies of advanced clinical process learned in the classroom.	

4. Additional Company or Training Project Details

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

Anchor has retained the services of the following Subcontractor.

Subcontractor Type	Subcontractor Name	City	Service Cost or %
Development	National Training Systems, Inc.	Ladera Ranch	\$ 10,000.00
Administrative	National Training Systems, Inc.	Ladera Ranch	13% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 1 - Group and Job Title Details

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

Group # 1: Retrainee/Job Creation - Retrainee Initiative Program			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
<i>Los Angeles County - 280 ATLANTIC AVE, Long Beach (ETP Required Wage: \$14.13)</i>			
Licensed Vocational Nurse	64	\$18.00 - \$20.00	\$0.00
Registered Nurse	24	\$32.50 - \$36.00	\$0.00

Group # 2: Retrainee			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
<i>Los Angeles County/SET - 280 ATLANTIC AVE, Long Beach (ETP Required Wage: \$22.04)</i>			
Administrative Staff	9	\$22.04 - \$40.00	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

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)	Clinical Services System Management
	Console
	Electronic Med Records App Skills
	Excel (Intermediate & Advanced Only)
	Kinnser
	MS Office Skills (Intermediate & Advanced Only)
	OASIS
	PowerPoint (Intermediate & Advanced Only)
	Word (Intermediate & Advanced Only)
Continuous Improvement Skills	Communication Skills
	Coordination of Care
	Critical Thinking
	Customer Service
	Documentation Skills
	Environmental Safety
	Interdisciplinary Team Process
	National Patient Safety Goals
	Preceptor Skills Training
	Problem Solving
	Quality Assessment and Improvement
	Team Building
Medical Skills (didactic)	Activities of Daily Living
	Advanced Cardiac Life Support
	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
	Carting Skills
	Central Venous Access Device
	Death and Dying
	Dementia Care
	Depression
	Diabetes Management
	Disaster & Emergency Preparedness
	Disease Management
	Elder Abuse
	Electrolyte Imbalance
	End-of-Life Care

Attachment 2 - Training Delivery and Curriculum Listing

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

Medical Skills (didactic)	Enteral Feeding Tube Management
	Equipment Skills
	Functional Mobility & Ambulation
	Gastrointestinal Management
	Grief and Bereavement
	Handling of Death in a Home
	Hazardous Materials
	Home Care
	Hospice Skills
	ICD-10 Coding
	Incontinence Management
	Infection Control
	Influenza Vaccination
	Intravenous Therapy
	Medical Social Worker Skills
	Medication Administration & Management
	Neurological Conditions
	Occupational Therapy Skills
	Orthopedic Conditions
	Pain Management (Acute & Chronic)
	Palliative Care
	Patient Assessment & Care
	Patient Fall Prevention
	Patient Transfer Techniques
	Physical Therapy Skills
	Point-of-Care Laboratory Testing
	Pressure Ulcers
	Psych & Spiritual Issues Death & Dying
	Rehabilitation Skills
	Respiratory Care
	Speech Therapy Skills
	Supplies, Medical Gasses and Drugs
	Tele Health
	Tele Medicare
	Tracheotomy Care
	Urinary Management
	Wound Care
	Wound Vac Therapy

<i>Delivery Method /Level</i>	<i>Productive Laboratory</i>
Training Type (Level)	Planned Course Offerings
Medical Skills (preceptor)	Body Mechanics
	Dementia Care
	Diabetic Management
	Enteral Feeding Tube Management
	Equipment Skills
	Functional Mobility & Ambulation

Attachment 2 - Training Delivery and Curriculum Listing

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

Medical Skills (preceptor)	Infection Control		
	Intravenous Therapy		
	Medication Admin & Management		
	Neurological Conditions		
	New Hire Nurse Skills		
	Occupational Therapy Skills		
	Orthopedic Conditions		
	Patient Assessment & Care		
	Physical Therapy Skills		
	Rehabilitation Skills		
	Rehabilitative Services		
	Speech Therapy Skills		
	Therapy Services		
	Wound Care		
PL Justification and Details			
Explain the need for productive laboratory (PL) training	RNs and LVNs will receive preceptor-led clinical training, which is characterized as Productive Lab (PL) in the ETMS system..		
Describe the Equipment/Processes to be used in delivering the Preceptor training	The trainee works the same shift as the Preceptor, and must be assessed for clinical competencies. At the end of each patient visit, the Preceptor and trainee discuss the outcome, what skills were validated or need improvement. The trainee is not allowed to have productive work time during the Preceptorship.		
Describe Trainer Qualifications	In-House RN's and LVN's with proficiency on the subject matter will be used as Preceptors.		
Trainer to Trainee Ratios - If more than one PL class the ratios are the lowest and the highest trainer-to-trainee ratio		Trainer	Trainee
Ratio for One Class, or Minimum When More than One Class		1	1
Ratio for Maximum Ratio When More than One Class		1	1
PLT Approval	Yes		



Training Proposal for:
Andrew Furuseth School of Seamanship

Agreement Number: ET18-0140

Panel Meeting of: October 27, 2017

ETP Regional Office: San Francisco Bay Area

Analyst: C. Hoover

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee Veterans	Industry Sector(s):	Transportation/Logistics Goods Movement Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Francisco	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Sailors' Union of the Pacific		
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		≤0%	

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
\$49,968		\$4,625 8%		\$54,593

In-Kind Contribution:	50% of Total ETP Funding Required	\$48,276
-----------------------	-----------------------------------	----------

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	Commercial Skills, HazMat	30	8-200	0	\$1,386	\$26.82
				Weighted Avg: 72			
2	Veterans Retrainee Priority Rate	Commercial Skills, HazMat	7	8-200	0	\$1,859	\$26.82
				Weighted Avg: 72			

Minimum Wage by County: \$17.63 per hour in San Francisco 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
Seaman	\$26.82 - \$32.31	37

INTRODUCTION

Founded in 1942, Andrew Furuseth School of Seamanship (AFSS) is located at the Sailors' Union of the Pacific headquarters' building in San Francisco. AFSS is dedicated to the education and promotion of seamen in all phases of the maritime industry. AFSS, the Sailor's Union of the Pacific (SUP) and its signatory maritime employers formed a Training Trust in 2002 for the purpose of providing training to eligible seamen. The Trust is governed by a Board of Trustees comprised of 2 labor and 3 management representatives. The SUP has collective bargaining agreements with six maritime companies, two of which are included in this proposal- Matson Navigation Company and Patriot Contract Services, LLC.

Trainees in this agreement operate vessels for the transportation of freight and passengers on the deep seas, primarily out of California ports located in San Francisco, Oakland, Alameda, San Pedro and Long Beach. These goods are transported to foreign ports all over the world, including the Pacific Rim and the Middle East, as well as to domestic ports in Hawaii and other Pacific Coast locations. Trainees in the proposed Agreement crew commercial ships, tugs and barges engaged in maritime transport. Typical duties include bridge watch-standing, shipboard and shore side maintenance, emergency response on deck or in the engine areas, and stewarding onboard.

The proposed ETP-funded AFSS training program will be certified by the US Coast Guard, an independent third party. In addition, the training standards have been approved by the International Maritime Organization (IMO), which is a special branch of the United Nations created in 1959. These are the Standards of Training Certification and Watchkeeping adopted by IMO

and last revised in 2012. This determination is unique to the facts and circumstances of the school's training standards and certification.

AFSS is eligible for ETP funding as a private school. Under Title 22, California Code of Regulations, Section 4426, private schools must be approved or certified by an independent third party whose review standards are satisfactory to the Panel.

Veterans Program

The Panel has established a higher reimbursement rate and other incentives for training California veterans. Higher support costs are also available to reach participants for this program. AFSS has committed to training 7 Veterans in Job Number 2.

This is the second ETP Agreement with AFSS. This is the first time Veterans have been introduced as a distinct cohort of trainees.

PROJECT DETAILS

Employer Demand

AFSS currently provides training in a variety of basic mariner skills and safety training required by the signatory employers. After completing 12 months of work aboard a ship, an Ordinary Seaman is eligible to take courses to become certified as an Able-Bodied Seaman. Two main courses are required: Basic Training which is a 40-hour training course and, "Life Boats," which is a 32-hour training course. The content of this training is determined by the needs of the hiring employer.

The current AFSS training program covers only some entry-level skills, while global competition and the complexity of the work has eliminated most entry-level positions on U.S. merchant vessels. In addition, there is an escalating shortage of qualified mariners in the United States Merchant Marine, as more are retiring than can join the industry. The training of mariners who want to move up from Ordinary Seaman to Able-Bodied Seaman needs to be expanded beyond what is available through the employers' current contributions under collective bargaining. ETP-funded training will allow more mariners to receive classroom training beyond the training already provided by AFSS.

In addition, the proposed training will also support the training of more Tankermen who are responsible for the transfer of bunker fuel to ships from tanker ships and/or barges. The USCG requires that these positions must be filled by mariners holding USCG-approved Tankermen Assist endorsements.

Training Plan

Training in this proposal is 100% center-based. AFSS has subcontracted with Training Resources Limited, Inc. (TRL) located in San Diego to provide all of the ETP-funded training. TRL has extensive experience preparing Ordinary Seamen to advance to the classification of Able Bodied Seamen. Training is scheduled to begin upon ETP approval and will be coordinated by the AFSS training director.

Commercial Skills (75%) – Trainees will receive skill sets needed to advance from Ordinary Seaman to Able Bodied Seaman. Trainees will also receive skills needed to qualify for the STCW.

Hazardous Materials (HAZMAT) Handling (25%) – Training will provide trainees with the skills to contain oil and other hazardous material spills while at sea. Trainees will also be trained in marine pollution prevention and security and proper handling of explosive/combustible materials.

Commitment to Training

AFSS represents that ETP funds will not displace the existing financial commitment to training and will not displace the training that participating employers currently provide. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law. Once trainees have completed the Able-Bodied Seamanship skills training, they will receive on-the-job training (not funded by ETP) on ships to put the new skill sets to practical use. ETP-funded training will upgrade skills and increase opportunities for advancement.

➤ Training Infrastructure

AFSS has one full-time Training Director who is a dedicated administrator and will conduct training assessments and scheduling of training.

Impact/Outcome

Training delivered in the proposed ETP Agreement will enable Ordinary Seamen to promote to Able-Bodied Seamen and meet new regulatory requirements mandated by the U.S. Coast Guard, consistent with the STCW.

Marketing and Support Costs

AFSS is requesting 8% in support costs to conduct ongoing assessments of employer-specific job requirements, identification of each trainee's skill deficits, and the development of individual training plans for each trainee.

Retention Modification

For Seamen and Mariners, it is not customary for workers to be employed for a standard retention period of 90 consecutive days full-time 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. Staff recommends using both the standard modification and the modified retention.

Tuition Reimbursement

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

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0467	Statewide	6/9/2015 – 6/8/2017	\$34,650	\$34,650 (100%)

DEVELOPMENT SERVICES

California Labor Federation in Sacramento and Strategy Workplace Communications in Oakland assisted with the development of this proposal at no cost.

ADMINISTRATIVE SERVICES

The AFSS retained Strategy Workplace Communications in Oakland to perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

Training Resources Limited, Inc. of San Diego will provide all training at an estimated cost of \$89,000.

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

8-200

Trainees will receive any of the following:

COMMERCIAL SKILLS**Navigational**

- 100 – 1600 Ton Master
 - Towing Endorsement
- Vessel Traffic Rules of the Road
- Radar Observer (ARPA)
- Bridge Resource Management

STCW and MMD ratings

- Rating Forming Part of a Navigational Watch
- Rating Forming Part of an Engineering Watch
- Specially Trained Ordinary Seaman
- Able Seaman
- Qualified Member of the Engine Department (QMED)
- QMED Oiler
- QMED Fireman / Watertender
- QMED Pumpman
- QMED Machinist
- QMED Electrician
- QMED Junior Engineer

Tankerman Endorsement

- Tankerman Assistant
- Tankerman Person-in-Charge

Engineering

- Designated Duty Engineer (DDE 1000 through DDE 4000)
- Limited Engineer Licenses

Steward Department

- Sanitary Food Preparation and Culinary Skills
- Restaurant Hazard Communication

Small Boat Operations

- Basic Boat Handling
- Launching and Recovery
- Search and Rescue

Safety Training

- Personal Safety and Social Responsibility
- Water Survival

Marlinspike Seamanship

- Knots
- Splicing Broken Lines and Wire Cables
- Tackle, Pulley and Sheaves
- Block and Tackle
- Ground Tackle

Military Training

- Basics of Naval Explosive Hazard Course
- Explosive Material Handling
- Explosive Cargo Handling and Stowage
- Small Arms Training: Initial Qualification and Renewal
- Emergency Communication Equipment

Survival and Emergency Response Training

- Survival Craft
 - Lifeboatman
 - Proficiency in Survival Craft
 - Automatic Electronic Defibrillator (AED)
 - Medical First Responder
- Fire Fighting
 - Advanced Firefighting
 - Basic Firefighting
- Shipboard Seamanship
 - Cargo Handling Equipment
 - Crane Training
 - Forklift Operator Training
 - Side Loader Operator Training
 - Special Forklift Training for Explosive Material Handling
 - Hand-Truck Operation and Safety
 - Cargo Stowage
 - Chemical, Biological and Radiological Equipment
 - Shipboard Damage Control Equipment
 - Anti-Terrorism and Anti-Piracy Procedures
 - Nautical and Marlinspike Terminology
 - Compass Types and Definitions
 - Vessel Types and Construction

HAZARDOUS MATERIALS (HAZMAT)

- Oil Spills
- Dangerous Chemicals
- Marine Pollution Prevention
- Security Training

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

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Andrew Furuseth School of Seamanship

CCG No.: ET18-0140

Reference No: 17-0284

Page 1 of 1

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Matson Navigation Company

Address: 555 12th Street

City, State, Zip: Oakland, CA. 94607

Collective Bargaining Agreement(s): Sailors' Union of the Pacific

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

Total # of full-time company employees worldwide: approx. 300

Total # of full-time company employees in California: approx. 200

Company: Patriot Contract Services, LLC

Address: 1320 Willow Pass Road, Ste. 485

City, State, Zip: Concord, CA 94520

Collective Bargaining Agreement(s): Sailors' Union of the Pacific

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

Total # of full-time company employees worldwide: 470

Total # of full-time company employees in California: 272

ETB-0140

Sailors' Union of the Pacific



TELEPHONE (415) 777-3400
FAX (415) 777-5088
WEBSITE www.sailors.org

BRANCHES PHONE
SEATTLE, 98199 • 4269 22nd AVE. W. • (206) 467-7944
WILMINGTON, 90744 • 533 N. MARINE AVE. • (310) 835-6617
HONOLULU, 96813 • 707 ALAKEA ST. • (808) 533-2777
GUNNAR LUNDEBERG • PRESIDENT/SECRETARY-TREASURER

HEADQUARTERS: 450 HARRISON STREET
SAN FRANCISCO, CALIFORNIA 94105



September 25, 2017

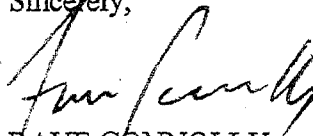
Employment Training Panel
1100 J Street, 4th Floor
Sacramento, CA 95814

Dear Panel Members:

This letter is to advise you that the Sailor's Union of the Pacific (SUP) supports the Andrew Furuseth School of Seamanship's ETP application. We have participated in meetings to understand how this training program would expand our members' skills to meet newly developed maritime industry standards. We have met regarding the ETP training schedule, the training curriculum and the recruitment plan for our members.

I fully support the ETP-funded training program and believe that the training will help SUP members meet the skills needed to position them for advancement and secure employment in the maritime industry. Should you have any other questions, please contact me at (415) 777-3400.

Sincerely,


DAVE CONNOLLY
Vice President



TRAINING PROPOSAL FOR

BEGA North America, Inc.

18-0523

Panel Meeting Date: 10/27/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Mark Reeves
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$ 89,658.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 89,658.00	N/A	\$ 0.00	\$ 146,271.00

APPLICANT PROFILE

Company Summary	BEGA North America, Inc. (BEGA), headquartered in Carpinteria, is a manufacturer of commercial lighting fixtures for lighting specifiers and distributors.
------------------------	--

Industry Sector(s)	Manufacturing
Priority Industry	Yes
No. Employees (Applicant)	State: 150 US: 150 World Wide: 150
Turnover Rate (Applicant)	2.00 %
Repeat Contractor	No
High Unemployment Area	No
Union(s)	No

TRAINING PROFILE

Training Objective(s)	BEGA is on a sustained growth trajectory and must equip both incumbent and new employees with updated skills to maximize productivity and meet customer demand.
------------------------------	---

Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	113	\$ 18.00	37	\$ 666	8 - 200
2	Job Creation – Retrainee Initiative Program, Retrainee	5	\$ 20.00	48	\$ 960	8 - 200
2	Job Creation – Retrainee Initiative Program, Retrainee, Temp to Permanent	10	\$ 20.00	48	\$ 960	8-200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1985, BEGA operates a state-of-the-art, 120,000-square-foot manufacturing facility and corporate campus in Carpinteria that houses a full engineering staff and an in-house powder coat paint facility. The Company's products are designed to satisfy both general and specific lighting tasks, as defined by architectural or exterior surroundings. The Company prides itself on attention to detail, fit, tolerances, and installation methods. Customers include contractors, architects, specifiers, government entities, and large corporations with large construction projects, including Apple, Google, and Facebook.

2. Current Training Project Details

Purpose of Training	<p>Over the past five years, BEGA's growth (revenue and employees) has nearly doubled. To accommodate this growth and meet rising customer demand, the Company must strive to be a leaner organization by keeping costs down and reducing waste. The Company plans to provide customized Lean training to improve processes and implement a new Enterprise Resource Planning (ERP) system to improve efficiency, decision making, and resource management. Both Lean and ERP training will help the Company develop knowledgeable and technically sound employees with the skills to ensure that customer expectations are met.</p> <p>In addition, BEGA must increase existing business capacity due to its growth. The Company has committed to hire and train 15 new employees (Group Number 2) during the contract term to support strategic initiatives to increase production.</p> <p>Training will take place at BEGA's facility in Carpinteria. Instruction will be provided by in-house subject-matter experts. The Company may also utilize specialized training vendors, when necessary.</p>
Training Infrastructure and Administrative Plan	BEGA has a current annual training budget of approximately \$65,000. The Company's training and leadership team will deliver, schedule, and document training. The Company has also retained an administrative consultant to ensure that all training and documentation adhere to ETP requirements.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

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

PROPOSED TRAINING PROJECT DETAILS

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations will receive Computer Skills and Continuous Improvement training, as shown in Attachment 2.	

4. Additional Company or Training Project Details

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

Temporary to Permanent Hiring

BEGA intends to train approximately 10 workers in Group 2 under Panel guidelines for the Temporary-to-Permanent program. The Company will retain these employees on a temporary basis, with the intention of hiring them into full-time, permanent positions after training. According to BEGA, the maximum term for converting temporary workers into full-time permanent employment is six months. Once hired, these workers become eligible to receive employer-paid share-of-cost healthcare premiums after 60 days of full-time permanent employment.

Under Panel guidelines for the Temporary-to-Permanent program, these trainees must be eligible to participate in ETP-funded training pursuant to Unemployment Insurance Code Section 10201(c). Moreover, they cannot be enrolled as trainees until after they have been hired by BEGA 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

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	California Manufacturing Technology Consulting	Torrance	\$ 8,900.00
Administrative	California Manufacturing Technology Consulting	Torrance	Not to exceed 13% of payment earned
Training	None selected to date	N/A	N/A

PROPOSED TRAINING PROJECT DETAILS

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 1 - Group and Job Title Details

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

Group # 1: Retrainee			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
<i>Santa Barbara County - 1000 Bega Way, Carpinteria (ETP Required Wage: \$16.16)</i>			
Administration	7	\$15.01 - \$45.00	\$1.15
Engineer	9	\$25.00 - \$45.00	\$0.00
Information Technology	2	\$32.00 - \$61.00	\$0.00
Manager	6	\$28.00 - \$57.00	\$0.00
Production	56	\$14.00 - \$42.50	\$2.16
Sales - 1	9	\$17.00 - \$42.00	\$0.00
Sales - 2	3	\$43.00 - \$72.00	\$0.00
Technician	3	\$15.00 - \$42.00	\$1.16
Warehouse	18	\$13.00 - \$28.00	\$3.16
Group # 2: Retrainee/Job Creation ±Retrainee Initiative Program/Temp to Permanent			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
<i>Santa Barbara County - 1000 Bega Way, Carpinteria (ETP Required Wage: \$13.22)</i>			
Administration-JC	2	\$12.00 - \$28.00	\$1.22
Engineer-JC	1	\$22.00 - \$45.00	\$0.00
Production-JC	6	\$12.00 - \$24.00	\$1.22
Sales-JC	3	\$16.00 - \$45.00	\$0.00
Warehouse-JC	3	\$12.00 - \$26.00	\$1.22

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

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)	Enterprise Resource Planning (ERP)
Continuous Improvement Skills	5S
	BBS Leadership
	BBS Lean Practitioner
	BBS Lean Training
	Bega Business Systems (BBS) Lean Principles
	Bega Business Systems (BBS) Lean Tools



TRAINING PROPOSAL FOR

B-K Lighting, Inc.

17-0974

Panel Meeting Date: 10/27/2017
Regional Office: Sacramento Regional Office
Analyst Name: Karen Mam
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$ 129,980.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 129,980.00	N/A	\$ 0.00	\$ 150,000.00

APPLICANT PROFILE

Company Summary	BK Lighting, Inc. (BK Lighting) manufactures specification-grade architectural and landscape lighting fixtures.
------------------------	---

Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 106	US: 106	World Wide: 106
Turnover Rate (Applicant)	11.00 %		
Repeat Contractor	No		
High Unemployment Area	Yes		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	B-K Lighting will be implementing a training program to improve production processes and efficiencies. The Company will also train on new equipment.
------------------------------	--

Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	100	\$ 18.00	67	\$ 1206	8 - 200
2	Job Creation – Retrainee Initiative Program, Retrainee, Temp to Permanent	7	\$ 20.00	67	\$ 1340	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1984 and headquartered in Madera, B-K Lighting specializes in manufacturing specification-grade architectural and landscape lighting fixtures such as floodlights, pendants, recessed lighting, and sign lights. Customers include landscape architects, lighting designers, electrical engineers, and contractors. The Company's products have been installed worldwide in venues such as the Mount Rushmore National Memorial, the Four Seasons Hotel in San Francisco, the Oklahoma City National Memorial and the Royal Mirage Palace Resort in Dubai. Training under this proposal will only be for the Madera location.

2. Current Training Project Details

Purpose of Training	<p>This is B-K Lighting's first ETP proposal. The Company recently expanded into the television and camera industries (sports lighting, flood lighting, tunnel lighting, tunnel-rated fixtures). This has changed several processes, and training will be needed to implement them. The Company has created a training program that incorporates Lean manufacturing principles to reduce waste and streamline processes.</p> <p>The Company will also be hiring new employees due to this expansion and recently invested \$975,000 on new equipment. This includes production automation equipment, automatic adhesive dispensing machinery, and spinning CNC machinery. Both new and incumbent staff will need to be trained on the new equipment.</p>
Training Infrastructure and Administrative Plan	B-K Lighting has designated an in-house Project Manager and staff to coordinate training, including scheduling and tracking. The Company also retained the services of a third-party administrative subcontractor.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
<p>All occupations identified will receive training applicable to their jobs in Business Skills, Commercial Skills, Computer Skills, Continuous Improvement Skills, Hazardous Materials Skills, Management Skills, and Manufacturing Skills. Literacy Skills training will be offered to staff members whose native language is not English.</p>	

PROPOSED TRAINING PROJECT DETAILS

Delivery Method/Level	E-Learning - Computer Based Training (CBT)
Summary	
Operations Staff, Lighting Staff, and Engineering Staff may receive up to 30 hours of CBT training in Manufacturing Skills.	

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

Delivery Method/Level	Productive Laboratory
Summary	
Operations Staff, Lighting Staff, and Engineering Staff will receive Productive Lab training in Manufacturing Skills. Training will be delivered with a 1:1 trainer-to-trainee ratio.	

4. Additional Company or Training Project Details

Retrainee - Job Creation

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

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

B-K Lighting requires additional staff to support its new line of lighting products and equipment. The Company will be hiring Administrative Staff, Customer Service Staff, Engineering Staff, IT Staff, Lighting Staff, Marketing/Sales Staff, and Operations Staff.

B-K Lighting has committed to hiring 8 new employees (Group Number 2). To qualify for Job Creation, trainees must be hired within the three-month period prior to Panel approval or during the term of contract. These trainees will be hired into "net new jobs" as a condition of contract.

Temporary to Permanent Hiring

The trainees in Group Number 2 will also come under Panel guidelines for "Temporary to Permanent" employment. B-K Lighting retains all employees through temporary agencies with the intention of hiring these workers into full-time, permanent positions after training. B-K Lighting has confirmed that the average time for "converting" temporary workers into full-time permanent employment is 3 months and will not exceed 6 months. These employees are eligible for health benefits at the beginning of the month after they have completed 30 days of employment. New employees are brought in on a temp-to-perm basis to ensure they will be able to meet all job requirements.

PROPOSED TRAINING PROJECT DETAILS

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

4.1 Program Waivers

Waivers	Description
HUA Wage Modification	<p>The 107 trainees in Groups 1 and 2 work in Madera County, a High Unemployment Area (HUA) with unemployment exceeding the state average by at least 25%.</p> <p>For these trainees, the Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. The Company is requesting this modification for trainees in Groups 1 and 2.</p>

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Sierra Consulting Service	Cameron Park	\$ 12,000.00
Administrative	Sierra Consulting Service	Cameron Park	Not to exceed 13% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 1 - Group and Job Title Details

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

Group # 1: Retrainee			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
Madera County/HUA - 40429 BRICKYARD DRIVE, Madera (ETP Required Wage: \$12.12)			
Administrative Staff	11	\$11.50 - \$30.00	\$0.62
Customer Service Staff	8	\$13.00 - \$30.00	\$0.00
Engineering Staff	6	\$15.00 - \$33.65	\$0.00
IT Staff	4	\$25.00 - \$35.00	\$0.00
Lighting Staff I	4	\$15.00 - \$30.00	\$0.00
Lighting Staff II	1	\$45.00 - \$50.00	\$0.00
Marketing/Sales Staff I	7	\$19.00 - \$45.00	\$0.00
Marketing/Sales Staff II	3	\$49.01 - \$75.00	\$0.00
Operations Staff I	55	\$11.00 - \$40.00	\$1.12
Operations Staff II	1	\$40.01 - \$45.00	\$0.00

Group # 2: Retrainee/Job Creation – Retrainee Initiative Program/Temp to Permanent			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
Madera County/HUA - 40429 BRICKYARD DRIVE, Madera (ETP Required Wage: \$10.50)			
Administrative Staff JC	1	\$10.50 - \$30.00	\$0.00
Customer Service Staff JC	1	\$10.50 - \$27.60	\$0.00
Engineering Staff JC	1	\$15.00 - \$33.65	\$0.00
IT Staff JC	1	\$20.00 - \$40.00	\$0.00
Lighting Staff JC	1	\$10.50 - \$30.00	\$0.00
Marketing/Sales Staff JC	1	\$12.00 - \$41.00	\$0.00
Operations Staff JC	1	\$10.50 - \$40.00	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Communication Skills
	Conflict Resolution
	Cost Control
	Customer Relationship Management
	Customer Service
	Dealing with Difficult People
	Employee Coaching
	Financial Analysis
	Leadership
	Marketing/Sales Techniques
	Negotiations
	Operational Skills
	Planning and Organization
	Product Knowledge
	Project Management
	Project Requirements Analysis and Specifications
	Strategic Planning
	Time Management
	Train the Trainer
Commercial Skills (Safety)	OSHA 10
	OSHA 30
Computer Skills (Standard)	Advanced Microsoft Office
	Crystal Reports
	Intermediate Microsoft Office
Continuous Improvement Skills	5S
	Change Management
	Creating a Quality Organization
	Creating Continuous Flow
	Decision Making
	How to Coach and Mentor
	Kaizen Training
	Key Performance Indicators
	Lean Procedures Practices
	Meeting Management
	Problem Solving
	Process Improvement
	Product Quality and Control
	Production Operations/Workflow
	Production Scheduling
	Quality Measurement Systems
	Root Cause Analysis
	Team Building
	Understanding Waste
Hazardous Materials Skills	Hazardous Materials Handling

Attachment 2 - Training Delivery and Curriculum Listing

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

Literacy Skills	Basic Math
	Vocational English
	Vocational English as a Second Language:
Management Skills	Coaching Procedures
	Motivation
	Team Building
Manufacturing Skills (ME) (Standard)	Assembly Procedures
	Assembly Process Control
	Blue Print Reading
	Changeover Procedures
	Computer Numeric Control (CNC) Machining
	Cross-Training in Production/Skills
	Electrical and Electronics
	Engineering Theory/Planning/Design
	Equipment Operation
	Fabrication
	Forklift Driving
	Inventory Control
	Loading
	Logistics
	Machining
	Manufacturing Practices
	Measurement and Measuring Devices
	Packaging
	Production Operations
	Tool Operation
	Troubleshooting
	Warehousing
<i>Delivery Method /Level</i>	<i>E-Learning – Instructor Led/Distance Learning</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Communication Skills
	Conflict Resolution
	Cost Control
	Customer Relationship Management
	Customer Service
	Dealing with Difficult People
	Employee Coaching
	Financial Analysis
	Leadership
	Marketing/Sales Techniques
	Negotiations
	Operational Skills
	Planning and Organization
	Product Knowledge
	Project Management
	Project Requirements Analysis and Specifications
	Strategic Planning

Attachment 2 - Training Delivery and Curriculum Listing

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

Business Skills	Time Management
	Train the Trainer
Computer Skills (Standard)	Advanced Microsoft Office
	Crystal Reports
	Intermediate Microsoft Office
Continuous Improvement Skills	5S
	Change Management
	Creating a Quality Organization
	Creating Continuous Flow
	Decision Making
	How to Coach and Mentor
	Kaizen Training
	Key Performance Indicators
	Lean Procedures Practices
	Meeting Management
	Problem Solving
	Process Improvement
	Product Quality and Control
	Production Operations/Workflow
	Production Scheduling
	Quality Measurement Systems
	Root Cause Analysis
	Team Building
	Understanding Waste
Hazardous Materials Skills	Hazardous Materials Handling
Literacy Skills	Basic Math
	Vocational English
	Vocational English as a Second Language:
Management Skills	Coaching Procedures
	Motivation
	Team Building
Manufacturing Skills (ME) (Safety)	OSHA 10
	OSHA 30
Manufacturing Skills (ME) (Standard)	Assembly Procedures
	Assembly Process Control
	Blue Print Reading
	Changeover Procedures
	Computer Numeric Control (CNC) Machining
	Cross-Training in Production/Skills
	Electrical and Electronics
	Engineering Theory/Planning/Design
	Equipment Operation
	Fabrication
	Forklift Driving
	Inventory Control
	Loading
	Logistics
	Machining
	Manufacturing Practices

Attachment 2 - Training Delivery and Curriculum Listing

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

Manufacturing Skills (ME) (Standard)	Measurement and Measuring Devices	
	Packaging	
	Production Operations	
	Tool Operation	
	Troubleshooting	
	Warehousing	
Delivery Method /Level		
E-Learning – Computer Based Training (CBT)		
Training Type (Level)	Planned Course Offerings	Standard Hours
Manufacturing Skills (ME) (Standard)	Shop Material Handling	8.00
Delivery Method /Level		
Productive Laboratory		
Training Type (Level)	Planned Course Offerings	
Manufacturing Skills (ME) (Standard)	Assembly Procedures	
	Assembly Process Control	
	Blue Print Reading	
	Changeover Procedures	
	Computer Numeric Control (CNC) Machining	
	Electrical and Electronics	
	Equipment Operation	
	Fabrication	
	Forklift Driving	
	Hydraulics	
	Loading	
	Machining	
	Measurement and Measuring Devices	
	Packaging	
	Painting	
	Pneumatics	
	Production Operations	
	Tool Operation	
	Troubleshooting	
	Welding	
PL Justification and Details		
Explain the need for productive laboratory (PL) training	Trainees need to learn hands-on skills for tools and complex machinery that class lab can't effectively train. Operations and Lighting occupations will have PL on Manufacturing skills.	
Describe the Equipment/Processes to be used in delivering the PL training	Trainees will learn how to operate, repair, clean and properly store lathes, CNC machines, band saw, manual mill, cold saw, hydraulic press, drill press, tapmatic tapping head, CMMS (coordinate measuring machine.	
Describe Trainer Qualifications	All B-K Lighting's trainers are experienced technicians. For new equipment, will use certified third party trainers in the equipment for which they are training the trainee.	
Trainer to Trainee Ratios - If more than one PL class the ratios are the lowest and the highest trainer-to-trainee ratio	Trainer	Trainee
Ratio for One Class, or Minimum When More than One Class	1	1
Ratio for Maximum Ratio When More than One Class	1	1
PLT Approval	Yes	



**TRAINING PROPOSAL FOR
CALIFORNIA FAUCETS, INC.
17-0971**

Panel Meeting Date: 10/27/2017
Regional Office: San Diego Regional Office
Analyst Name: Joe Davey
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$ 108,000.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 108,000.00	N/A	\$ 0.00	\$ 62,250.00

APPLICANT PROFILE

Company Summary	California Faucets, Inc. manufactures and assembles hand-finished, custom bath and kitchen faucets & fittings. The Company sells its products to retail and wholesale businesses, primarily local and national plumbing stores and showrooms.		
Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 150	US: 151	World Wide: 151
Turnover Rate (Applicant)	4.00 %		
Repeat Contractor	No		
High Unemployment Area	No		

Union(s)	No.
-----------------	-----

TRAINING PROFILE

Training Objective(s)	Provide training in Business, Computer, and Manufacturing skills to give trainees the skills to meet the needs of a growing company, utilize a new ERP system, and operate new equipment and machinery.
------------------------------	---

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	125	\$ 18.00	48	\$ 864	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 1988 and headquartered in Huntington Beach, California Faucets, Inc. (California Faucets) manufactures and assembles hand-finished, custom kitchen and bath faucets, shower systems, luxury drains, fittings, and accessories. Customers include: Pirch, Hajoca, Ferguson, Waterworks, and George's Pipe & Plumbing Supply. The Company is a member of the Decorative Plumbing Hardware Association, Kitchen & Bath Association, Luxury Plumbing Group and Forte Buying Group.

Also participating in training is PVD Coatings II, LLC, a wholly owned subsidiary also located at an adjacent address in Huntington Beach.

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>California Faucets reports an increase in its growth rate of 15% - 20% per year. In order to keep up with demand, the Company implemented a new ERP system in August. Workers must be able to easily navigate and use the ERP software and most of the training is specifically related to this new system.</p> <p>As another aspect of growth, California Faucets is building a chrome plating processing line. The Production Platers, PVD Machine Operators and related occupations will need training on this new equipment. Successful completion of training will lead to job-specific certifications required for most of these occupations. Administrative and support occupations will receive ancillary training in Business Skills.</p>
Training Infrastructure and Administrative Plan	Project administration will be in-house, as a responsibility of the Company's Controller.
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 shown below. See *Attachment 2 - Training Delivery and Curriculum Listing* for more detail.

PROPOSED TRAINING PROJECT DETAILS

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations will receive training in Business and Computer topics.	

Delivery Method/Level	E-Learning - Computer Based Training (CBT)
Summary	
Trainees will receive E-Learning training in Business Skills topics.	

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

4. Additional Company or Training Project Details

Productive Laboratory Justification: California Faucets will provide Productive Lab training in Manufacturing skills to approximately 25 Platers/Finishers, PVD Machine Operators, Manufacturing Engineer, and Production Assistants in metal plating and PVD Coating skills for a maximum of 40 hours.

The trainer-to-trainee ratio will be 1:1, and up to 1:3 ratio for small teams that work together in producing products to assure consistency in skills acquisition. See Attachment 2 – PL Justification for the need for PL training, as well as the equipment used and trainer qualifications.

4.1 Program Waivers

No waivers have been applied to this proposed project.

4.2 Subcontractor Summary

The applicant has not retained the services of a Subcontractor, at this time.

4.3 Previous ETP Project Summary

The applicant has no previous ETP Contracts.

4.4 Supporting Panel Proposal Documentation

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

Attachment 1 - Group and Job Title Details

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

Group # 1: Retrainee			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
Orange County - 5231 ARGOSY AVE, Huntington Beach (ETP Required Wage: \$17.22)			
Accounting & Admin	5	\$17.75 - \$32.70	\$0.00
Customer Service Associate	10	\$14.50 - \$22.88	\$2.53
Customer Service Manager	1	\$36.06 - \$36.06	\$0.00
Director Admin	1	\$38.47 - \$38.47	\$0.00
Engineer	5	\$15.00 - \$31.72	\$2.53
Inside Sales	2	\$37.23 - \$40.87	\$0.00
Inventory Control Clerks	7	\$11.00 - \$18.00	\$2.43
IT Programmers	2	\$45.44 - \$66.00	\$0.00
IT Support	1	\$19.50 - \$19.50	\$0.00
Machinist	1	\$17.87 - \$17.87	\$0.00
Maintenance	2	\$20.00 - \$25.25	\$0.00
Marketing Social Media Mgr	1	\$57.70 - \$57.70	\$0.00
Mfg Engineer	1	\$27.65 - \$30.00	\$0.00
Platers and Finishers	21	\$11.55 - \$18.53	\$2.43
Production Assistant	1	\$18.05 - \$18.05	\$0.00
Production Supervisors	4	\$25.62 - \$37.02	\$0.00
Pullers & Packers	35	\$11.00 - \$16.50	\$2.43
Purchasing Agent	3	\$16.50 - \$25.18	\$2.53
Quality Control Inspector	1	\$25.00 - \$25.00	\$0.00
Sales & Mktg Support Admin	2	\$22.60 - \$25.50	\$0.00
Shipping & Receiving Clerks	5	\$11.50 - \$15.00	\$2.53
Shipping Supervisor	1	\$21.53 - \$21.53	\$0.00
Supply Chain Manager	1	\$38.47 - \$38.47	\$0.00
Water Bearing Assembler Tester	6	\$14.00 - \$21.40	\$2.43
Orange County - 5271 ARGOSY AVE, Huntington Beach (ETP Required Wage: \$17.22)			
Accounting & Admin	2	\$17.75 - \$32.70	\$0.00
PVD Physical Vapor Deposition Machine Operators	1	\$52.89 - \$52.89	\$0.00
PVD Physical Vapor Deposition Quality Control	1	\$18.00 - \$18.00	\$0.00
PVD Physical Vapor Desposition Manager	2	\$19.50 - \$32.00	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

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	Apics Production & Inventory
	Apics Supply Chain
	CNC (computer numerical control) Programming
	Interior Design Certification
	Inventory Mgmt / Cycle Count Practices
	Supervisory Training
	Torque Wrench Use & Calibration
Computer Skills (Standard)	Accounts Receivable Module
	Accounts Payable Module
	Adobe InDesign & Avator Catalog
	AutoCad Software
	Customer Service Module
	Engineering Module
	Finance Module
	Forecasting Module
	Interco CF - PVD Module
	Inventory Module
	MSC Office Intermediate / Advanced
	Procurement Module
	Production Module
	Sales & CRM Module
	Shipping Module

Delivery Method /Level	E-Learning – Computer Based Training (CBT)	
Training Type (Level)	Planned Course Offerings	Standard Hours
Business Skills	Engineering - Lynda.com	4.00

Delivery Method /Level	Productive Laboratory
Training Type (Level)	Planned Course Offerings
Manufacturing Skills (ME) (Standard)	Pick Ticket to Production
	Plating Line Process
	PVD Coating Part Tracking

PL Justification and Details		
Explain the need for productive laboratory (PL) training	We are installing / building a chrome plating processing line in our facility. It is not feasible to re-create chrome plating process in a classroom venue. Hands on training and assimilation is necessary.	
Describe the Equipment/Processes to be used in delivering the PL training	nickel tank dipping and timing, PH level testing & balancing, proper voltage of rectifiers, Nickel to Trivalent Chrome bathing, color testing & finishing consistency, adding of chemicals, cleansing of parts, pre-treatment before electroplating, ultrasonic cleaning, hepa filters, boiler mtnce, proper disposal of hazardous waste	
Describe Trainer Qualifications	Two current Plating and Finishing Supervisors, with current industry certificates and each having over 15+ years of hands on experience.	
Trainer to Trainee Ratios - If more than one PL class the ratios are the lowest and the highest trainer-to-trainee ratio	Trainer	Trainee
Ratio for One Class, or Minimum When More than One Class	1	1
Ratio for Maximum Ratio When More than One Class	1	3
PLT Approval	Yes	



TRAINING PROPOSAL FOR
California Sheet Metal Works, Inc.
17-0884

Panel Meeting Date: 10/27/2017
Regional Office: San Diego Regional Office
Analyst Name: Kellen Hernandez
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: \$132,818.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$132,818.00	N/A	\$0.00	\$254,135.00

APPLICANT PROFILE

Company Summary	California Sheet Metal Works, Inc. (CSMW), is a sheet metal manufacturer, and composite panel and ornamental metal fabricator and installer in the Southern California region.
------------------------	--

Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. of Employees (Applicant)	State: 139	US: 139	World Wide: 139
Turnover Rate (Applicant)	5.00 %		
Repeat Contractor	No		
High Unemployment Area	Yes		
Unions	Sheet Metal Workers International Association, Local 206		

TRAINING PROFILE

Training Objective	Training will help meet increasing customer requirements, specifications and quality audits. Training will enable its employees to improve efficiency, reduce waste/costs and improve product quality. This project will provide the Company with a competitive advantage and help increase revenue and profit margin.
---------------------------	--

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	137	\$18.00	53	\$954	8 - 200
2	Retrainee, Veterans Program	10	\$22.00	53	\$1,166	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1908 and headquartered in El Cajon, CSMW provides customers in the construction industries with quality sheet metal/composite panel products and services. The Company collaborates directly with end use customers (building owners), architects and contractors in the concept, design, production and installation.

CSMW has obtained the support of the Sheet Metal Workers International Association, Local 206 to train the represented Production and Manufacturing workers.

This will be CSMW's first ETP Agreement.

2. Current Training Project Details

Purpose of Training	<p>CSMW identified the need to improve efficiency, reduce waste/costs and improve product quality as three major business needs. Training in these areas will increase sales, profit margin and production. CSMW also identified that training its staff on the newest industry advances will help the Company meet its business goals.</p> <p>CSMW will train staff in Lean manufacturing principles and implement a Lean process training program. Specifically, training will focus on new state-of-the-art press brakes, CNC machinery and equipment operation. This training will enable staff to reduce downtime, reduce defects and improve product quality. In addition, training staff in advances in installation procedures will reduce costs and ensure employees have the correct equipment and tools to complete the project on time.</p> <p>Training will also include Building Information Modeling software that customers are requiring on all projects. Training will enable staff to improve efficiency and streamline operations by creating precise plans/blueprints and drawings.</p>
Training Infrastructure and Administrative Plan	<p>CSMW's Controller and Vice President of Production will oversee project administration and ensure attendance records are completed correctly with current quality assurance processes. CSMW currently documents training and will incorporate ETP recordkeeping regulations. CSMW has a systematic process in place to schedule training with trainees and trainers that will ensure ETP attendance rosters are completed correctly.</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 appears below. See *Attachment 2 - Training Delivery and Curriculum Listing* for more details.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations will receive job specific training in Business, Computer, Continuous Improvement and Manufacturing Skills topics listed under Attachment 2. No apprentice training is included in the proposed training plan. Training will be delivered by in-house experts and vendors if needed.	

Delivery Method/Level	Productive Laboratory (P/L)
Summary	
Trainees will receive P/L training in Manufacturing Skills topics listed under Attachment 2. No apprentice training is included in the proposed training plan (See Attachment 2). See justification for PL in Attachment 2.	

4. Additional Company or Training Project Details

4.1 Program Waivers

Waivers	Description
Retention Period for Veterans	Alternate Retention Period: 500 hours within 272 consecutive days, working full-time with one or more Employers

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or %
Development	Training Funding Source	Seal Beach	\$ 4,900.00
Administrative	Training Funding Source	Seal Beach	13% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 1 - Group and Job Title Details

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

Group # 1: Retrainee			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
<i>San Diego County/HUA - 1020 N MARSHALL AVE, El Cajon (ETP Required Wage: \$12.54)</i>			
Administrative	6	\$13.00 - \$41.00	\$0.00
Engineers	6	\$16.00 - \$45.00	\$0.00
Manufacturing	101	\$13.00 - \$42.00	\$0.00
Project Lead	9	\$13.00 - \$42.00	\$0.00
Supervisor/Manager	5	\$45.00 - \$74.00	\$0.00

Group # 2: Retrainee/Veterans Program			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
<i>San Diego County/HUA - 1020 N MARSHALL AVE, El Cajon (ETP Required Wage: \$12.54)</i>			
Production	10	\$13.00 - \$39.00	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

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
	Coach/Mentoring
	Communication/Conflict Resolution
	Contract Administration
	Customer Service
	Decision Making
	Empowering and Motivation
	Leadership Energy Environmental Design (LEED)
	Order Processing
	Planning - Forecasting for Sales and Service
	Product Planning
	Production Practices & Procedures
	Project Management
	Purchasing
	Sales & Marketing
	Scheduling
	Shipping and Receiving
	Time Management
	Effective Meeting Techniques
	Employee Benefits Management
	Frontline Leadership
Commercial Skills (Safety)	OSHA 10 (Requires 10hrs completion)
	OSHA 30 (Requires 30hrs completion)
Computer Skills (Standard)	Enterprise Resource Planning
	Fastcut
	Banking
	Electronic Timecards
	Estimating
	Human Resource/ Benefit/Payroll
	Internet/Intranet
	Plan Grid
	ProContractor
	Real Trac
	Remote Access System
	Tool Assistant Management
	Visio
	AutoCad
	Building Information Modeling (BIM)
	Information Security
	Inventor Software (Autodesk 3D CAD)
	MS Office (Intermediate)
	Network Management
	Solid Works 3D Design
	System Administration

Attachment 2 - Training Delivery and Curriculum Listing

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

Continuous Improvement Skills	Just In Time (JIT)
	Manufacturing Efficiencies
	Problem Solving/Root Cause Analysis
	Process Improvement
	Productivity Analysis
	Quality Management System/Improvement
	Statistical Process Control (SPC)
	Teambuilding
Hazardous Materials Skills	Hazmat handling
Manufacturing Skills (ME) (Standard)	Best Practices
	Computer Numerical Control Machining
	Electrical Assembly
	Electro Static Discharge
	Equipment Operation and Maintenance (Press Brake)
	Fall Protection
	Good Manufacturing Practices (GMP)
	Installation procedures
	Inventory Control
	Job Site Procedures
	Laser Technician
	Lean Manufacturing
	Material Requirements Planning (MRP)
	Preventive Maintenance
	Scaffolding
	Shop Procedures
	Soldering
	Supply Chain Management
	Trouble Shooting
	Welding
	Assembly Procedures (wire harness)

<i>Delivery Method /Level</i>	<i>Productive Laboratory</i>
Training Type (Level)	Planned Course Offerings
Manufacturing Skills (ME) (Standard)	Equipment Operations (CNC Machines, Soldering Tools)
	Manufacturing/Assembly/Installation Skills

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	This training cannot be duplicated in a class or simulated lab environment. Actual sellable production will be minimal during this training. Training will be main objective, not production. Due to the nature of manufacturing, hands-on training, creating new parts, using new procedures, testing and inspection requirements that our employees will be working with it are essential for the growth of our company. P/L training will be capped at 60 hours per-trainee.	
Describe the Equipment/Processes to be used in delivering the PL training	Manufacturing/assembling and installation equipment including CNC Machines, soldering tools, welding equipment, measuring tools, and various wrenches. The same machines and tools that they will be using when training is completed.	
Describe Trainer Qualifications	Trainers will work exclusively with trainee. They will assign projects with step-by-step instructions to trainees. They will observe, direct and provide immediate feedback to the trainee as work is performed. Trainers are fully qualified in the specific area of training and will be most qualified. The trainers are lead or supervisors with extensive experience in the processes and equipment being used for training.	
Trainer to Trainee Ratios - If more than one PL class the ratios are the lowest and the highest trainer-to-trainee ratio	Trainer	Trainee
Ratio for One Class, or Minimum When More than One Class	1	1
Ratio for Maximum Ratio When More than One Class	1	1
PLT Approval	Yes	

International Association of Sheet Metal, Air, Rail and Transportation Workers
SHEET METAL LOCAL 206

4594 Mission Gorge Place
San Diego, CA 92120



Phone: (619) 265-0501

Fax: (619) 265-0084

DOUGLAS TRACY
Business Manager / Financial Secretary-Treasurer

September 22, 2017

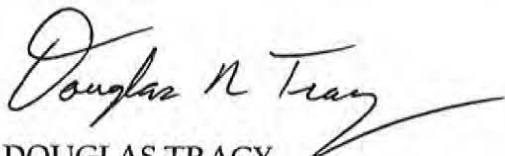
Employment Training Panel
San Diego Regional Office
9246 Lightwave Ave. Bldg. A, Ste 300
San Diego, CA 92123

RE: ETP Training for Sheet Metal members represented by SMART Local 206

To Whom It May Concern:

I have reviewed the training to be offered through the Employment Training Panel program by California Sheet Metal Works, Inc., to represented members of SMART Local 206 – Sheet Metal and authorize their participation in this training. I am in agreement with California Sheet Metal Works, Inc., that Local 206 will provide on-going input in reference to any proposed changes and fully endorse the training proposed.

Sincerely,



DOUGLAS TRACY
Business Manager
Financial Secretary-Treasurer

DT/ar
opeiu#537afl-cio



Training Proposal for:
Chatsworth Products, Inc.
Agreement Number: ET18-0133

Panel Meeting of: October 27, 2017

ETP Regional Office: North Hollywood

Analyst: M. Niquet

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 checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
Number of Employees in:	CA: 191	U.S.:625	Worldwide: 658	
<u>Turnover Rate:</u>	1%			
<u>Managers/Supervisors:</u> (% of total trainees)	13%			

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)		(High Earner Reduction)	=	Total ETP Funding
\$73,710		\$0		\$0		\$73,710

In-Kind Contribution:	100% of Total ETP Funding Required	\$82,708
-----------------------	------------------------------------	----------

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills Computer Skills Continuous Impr, Management Skills, Mfg Skills	117	8-200	0	\$630	\$16.96
				Weighted Avg: 35			

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: \$16.96 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 \$3.21 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Programmer	\$32.50-\$33.47	1
Machine Operators	\$14.00-\$22.23	24
Production Staff	\$14.42-\$18.41	10
Welders	\$14.00-\$20.60	9
Painting Staff	\$13.75-\$18.02	9
Assemblers/Packers	\$13.75-\$21.08	34
Material Handlers	\$14.42-\$15.50	2
Quality Assurance Technicians	\$21.63-\$30.00	2
Shipping/Receiving Coordinators	\$14.18-\$16.32	5
Engineering Staff	\$38.46-\$40.01	2
Human Relations Staff	\$17.50-\$27.31	6
Finance/Accounting Staff	\$19.18-\$29.36	2
Manufacturing Training Facilitator	\$33.65-\$34.65	1
Team Leaders	\$22.06-\$30.70	5
Maintenance Staff	\$30.82-\$57.69	2
IT Support Specialist	\$27.81-\$28.64	1
Pricing Specialists	\$21.58-23.00	2

INTRODUCTION

Founded in 1991 and headquartered in Agoura Hills, Chatsworth Products, Inc. (CPI) (www.chatsworth.com) manufactures IT infrastructure equipment for a large variety of customers that include top Fortune 100 companies, government organizations and local businesses. The various types of equipment produced includes Servers and Network Cabinets, Open Rack Systems, Wall Mounted Systems, Environmental Monitoring Systems and Grounding Solutions.

The Company has one manufacturing plant in Chatsworth. The Company has operations in other states (Texas and North Carolina) and countries (Mexico, Canada, England, China and Dubai).

PROJECT DETAILS

As a medium-sized company, CPI needs to remain competitive with large international companies by delivering quality products that can be highly customized to meet individual customer demands. As a result of this specialized service, there is a need to increase production volume, while controlling costs. CPI is in a competitive situation where manufacturing in other states is becoming more fiscally attractive than remaining in California. Therefore, employees must continue to develop their skills sets and technological capabilities to continue efficient production. Training and developing a skilled workforce will allow employees to improve their understanding of key performance indicators and develop relevant measurements to improve communication and performance objectives within their teams. Training will also help employees achieve corporate and customer goals and improve efficiencies in machine utilization, and manufacturing tools which will aid in developing large volumes of customizations for clients.

Training Plan

This will be the Company's second ETP Agreement, the first in the last five years. The Company is ready to start training upon approval of this agreement. Training will take place at the Company's location in the Chatsworth and will be provided by both in-house subject-matter experts and vendors to be identified during the contract term.

Business Skills (10%): This training will be offered to all occupations to provide staff with skills to effectively manage their time, multi-task, generate and deliver quality presentations, and communicate effectively with both internal and external customers.

Computer Skills (5%): This training will be offered to all occupations in order to ensure that employees have the skills to effectively utilize the Company's ERP system and sustain operational effectiveness.

Continuous Improvement (40%): This training will be offered to all occupations. These skills will directly support the Company's development of standard processes to improve efficiency.

Management Skills (5%): This training will be offered to Management to ensure that they possess the skills to effectively manage teams, deploy the Company's strategic goals and fulfill the current volume demands.

Manufacturing Skills (40%): This training will be offered to Management, Production Staff and Engineering Staff to ensure employees possess the technical knowledge to execute their job responsibilities and meet the growing complexities of customization needs.

Commitment to Training

CPI spends an estimated \$30,000 annually in training for 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.

➤ Training Infrastructure

The Company has identified internal lead personnel to oversee training, scheduling, and tracking to ensure that administration and documentation adhere to ETP requirements.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

To be Determined

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

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- Business Administration
- Inventory Control
- Conflict Management
- Communication Skills
- Customer Complaints
- Goal Setting
- Project Management
- Time Management
- Presentation Skills
- Providing Quality Customer Service
- Product and Technical Knowledge

COMPUTER SKILLS

- Enterprise Resource Planning
- Microsoft Office Suite
- Database Management
- Trumpf/Amada/Robotic Welder/CAD/CAM/Trumpf/Amada Software Training
- Engineering & Document Control

CONTINUOUS IMPROVEMENT

- Design for Manufacturability
- JIT
- TQM
- Andon
- Kaizen
- Kanban
- Six Sigma
- 5S
- Failure Modes and Effects Analysis
- Statistical Process Control
- Root Cause Analysis
- Quality Management Systems
- Value Stream Mapping

MANAGEMENT SKILLS (management trainees only)

- Management/Supervisory Skills
- Strategic Planning and Policy Deployment
- Team Building
- Coaching Practices

MANUFACTURING SKILLS

- Programmable Logic Controllers
- Welding

- Blueprint Reading
- Shop Math
- Geometric Dimensioning & Tolerancing
- Robotic Welder/Trumpf/Amada Programming
- Production Skills
- Lean Skills
- Writing Standard Operating Procedures
- Good Manufacturing Practices
- New Procedures per Lean Manufacturing Projects
- Manufacturing Logistics Management
- Quality Inspection
- Supply Chain Optimization
- Production and Inventory Management

Safety Training will be limited to 10% of a trainee's 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
DYTRAN INSTRUMENTS, INC.
18-0519

Panel Meeting Date: 10/27/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Margarita Paccarelli
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$ 201,852.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 201,852.00	N/A	\$ 0.00	\$ 207,231.00

APPLICANT PROFILE

Company Summary	Dytran designs and manufactures sensors used in commercial, industrial, military and laboratory applications.
------------------------	---

Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 164	US: 166	World Wide: 166
Turnover Rate (Applicant)	0.00 %		
Repeat Contractor	No		
High Unemployment Area	No		
Union(s)	No		

TRAINING PROFILE

Training Objective(s)	Dytran will train employees on new equipment and production processes.
------------------------------	--

Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	162	\$ 18.00	47	\$ 846	8 - 200
2	Job Creation – Retrainee Initiative Program, Retrainee	36	\$ 20.00	90	\$ 1800	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1980, Dytran Instruments (Dytran) is a fast growing sensor manufacturer. Its products are designed and manufactured exclusively in its Chatsworth facility. Its major customers include Boeing, Airbus, SpaceX, Lockheed Martin and other companies in the aerospace industry. It also serves the automotive industry (Ford and Rolls Royce), oil drilling (Schlumberger), and industrial customers (Proctor & Gamble, John Deere, and Caterpillar). Dytran is also a supplier to Apple for sensors used to test many of its products.

2. Current Training Project Details

Purpose of Training	<p>Dytran is expanding its presence in the marketplace by advancing its technology and infiltrating new markets. Its sales have increased significantly over the past year and therefore, created a need for additional employees to support its growth. In order to remain competitive, Dytran must stay at the forefront of technology by hiring, educating, and training its workforce.</p> <p>In 2016, Dytran invested \$380k in new equipment which includes a Donaldson Filtration System and three CNC machines. This year, they've invested \$105k in CMM Machine, an automated measuring machine. The Company is currently in a growth pattern and will be buying additional equipment to meet business needs within the next two years. This proposal will focus on training on new equipment as well as training of new employees in production processes.</p>
Training Infrastructure and Administrative Plan	<p>Dytran's Chief Financial Officer along with the Human Resources Department will be directly responsible for scheduling, training, delivery, and documentation. The Company has a dedicated trainer for its manufacturing process and in-house trainers that are subject matter experts.</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.

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

PROPOSED TRAINING PROJECT DETAILS

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations will receive Class/Lab Business Skills and Computer Skills training. Managers and Supervisors will receive Management Skills training. All occupations involved in production will receive training in Manufacturing Skills/Standard and Hazardous Materials. Some Engineers and Production Workers will receive Computer Skills/Advanced Technology in Programming Languages and Sensory Technology. Training is shown in detail in Attachment 2 of the proposal.	

4. Additional Company or Training Project Details

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

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

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 1 - Group and Job Title Details

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

Group # 1: Retrainee			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
Los Angeles County - 21592 MARILLA ST, Chatsworth (ETP Required Wage: \$16.96)			
Accounting	2	\$35.49 - \$43.27	\$0.00
Administrative Support	16	\$15.17 - \$30.30	\$1.79
Engineering	9	\$31.25 - \$43.73	\$0.00
Human Resources	2	\$33.00 - \$34.62	\$0.00
Maintenance Worker	1	\$15.17 - \$15.17	\$1.79
Managers	12	\$33.74 - \$57.69	\$0.00
Production Worker	101	\$15.17 - \$36.00	\$1.79
Sales Staff	13	\$15.17 - \$36.83	\$1.79
Supervisors	6	\$21.32 - \$28.84	\$0.00

Group # 2: Retrainee/Job Creation – Retrainee Initiative Program			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
Los Angeles County - 21592 MARILLA ST, Chatsworth (ETP Required Wage: \$14.13)			
JC Administrative Support	2	\$12.50 - \$30.30	\$1.63
JC Engineering	3	\$29.80 - \$43.73	\$0.00
JC Maintenance Worker	1	\$12.34 - \$12.34	\$1.79
JC Managers	6	\$33.74 - \$57.69	\$0.00
JC Production Worker	20	\$12.34 - \$36.00	\$1.79
JC Sales Staff	2	\$14.13 - \$36.83	\$0.00
JC Supervisors	2	\$21.32 - \$28.84	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

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
	Customer Sales & Service
	Marketing & Business Strategies
	Negotiating
	Payroll
	Product Knowledge
	Supply Chain Management
Computer Skills (Standard)	D3 - Manufacturing System
	Engineering and Document Control
	General Accounting
	HR Information System
	Microsoft Office (Intermediate or Advanced)
	Payroll
	Solidworks
Continuous Improvement Skills	Conflict Resolution
	Decison Making
	Frontline Leadership
	ISO/AS Standards
	Lean Manufacturing
	Process Improvement
	Project Management
	Root Cause Analysis
	Six Sigma
	Team Building
	Total Quality Management
Hazardous Materials Skills	Hazardous Materials Handling & Disposal
Management Skills	Coaching & Mentoring
	Employee Relations
	Leadership & Delegation
	Organizational Development
	Performance Management
Manufacturing Skills (ME) (Advanced Technology)	Programming Languages
	Sensor Technology
Manufacturing Skills (ME) (Standard)	Assembly Procedures
	ESD (Electro Static Discharge) & FOD (Foreign Object Debris)
	IPC Standards
	Operate Forklift
	Set Up and Operate Production Machinery
	Shop Floor Safety Procedures



TRAINING PROPOSAL FOR

Emser Tile, LLC

17-0942

Panel Meeting Date: 10/27/2017

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: \$ 245,700.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 245,700.00	N/A	\$ 0.00	\$ 409,500.00

APPLICANT PROFILE

Company Summary	Headquartered in Los Angeles/West Hollywood, Emser Tile, Inc. (Emser) is a leading designer, marketer, and producer of fine tile and natural stone.
------------------------	---

Industry Sector(s)	Manufacturing
Priority Industry	Yes
No. Employees (Applicant)	State: 375 US: 950 World Wide: 950
Turnover Rate (Applicant)	19.00 %
Repeat Contractor	No
High Unemployment Area	Yes
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Emser must improve its operational efficiencies to support the Company's growth in new and existing markets.
------------------------------	--

Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	210	\$ 18.00	65	\$ 1170	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Established in 1968, Emser is one of the most comprehensive sources for interior and exterior porcelain, ceramic, metal, glass, quarry, decorative accents and mosaics, cut-to-size stone, and setting material products for both residential and commercial projects. The Company also makes custom manufactured products. Emser's customer base includes dealers, homebuilders, contractors, installers, architects, designers, and homeowners.

2. Current Training Project Details

Purpose of Training	<p>Emser is expanding and entering into new markets. For this, the Company has identified a need to improve employee skills in key business areas such as Sales, Customer Service, and Warehousing. The Company has developed a training plan that will upgrade skills, integrate newer employees, and implement business improvements designed to enhance sales and maximize operational resources. Training will focus on product knowledge and pricing, selling techniques, and JD Edwards Enterprise Resource Planning system to improve order fulfillment and freight management.</p> <p>Training will include employees from 18 Emser facilities in California and will be provided using a combination of E-Learning, Class/Lab, and Computer-Based Training delivery methods. Instruction will primarily be provided by Emser's Training Manager, with assistance from in-house subject matter experts. The Company may also utilize specialized training vendors, if necessary.</p>
Training Infrastructure and Administrative Plan	<p>Emser has an annual estimated training budget of approximately \$200,000. The Company already has infrastructure in place, an in-house training program called Emser University. Emser's Training Manager will serve as lead educator and oversee centralized project administration. The Company also has personnel available at each facility to assist with project coordination.</p>
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

PROPOSED TRAINING PROJECT DETAILS

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations will receive Business Skills training, as shown in Attachment 2.	

Delivery Method/Level	E-Learning - Computer Based Training (CBT)
Summary	
All occupations will receive up to 30 hours of Computer Skills via CBT.	

Delivery Method/Level	E-Learning - Instructor Led/Distance Learning
Summary	
All occupations will receive Business Skills via E-Learning.	

4. Additional Company or Training Project Details

LMS

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

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	None selected to date	N/A	N/A

PROPOSED TRAINING PROJECT DETAILS

Administrative	None selected to date	N/A	N/A
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 1 - Group and Job Title Details

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

Group # 1: Retrainee			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
Alameda County - 1489 Doolittle Drive, San Leandro (ETP Required Wage: \$17.63)			
Branch Management	2	\$40.00 - \$50.00	\$0.00
Customer Support Rep	2	\$18.00 - \$20.00	\$0.00
Sales Rep	2	\$20.00 - \$30.00	\$0.00
Warehouse	2	\$18.00 - \$20.00	\$0.00
Fresno County/HUA - 5650 East Clinton Avenue, Fresno (ETP Required Wage: \$12.12)			
Branch Management	2	\$40.00 - \$50.00	\$0.00
Customer Support Rep	2	\$18.00 - \$20.00	\$0.00
Sales Rep	2	\$20.00 - \$30.00	\$0.00
Warehouse	2	\$18.00 - \$20.00	\$0.00
Kern County/HUA - 4546 Stine Road, Bakersfield (ETP Required Wage: \$12.12)			
Branch Management	2	\$40.00 - \$50.00	\$0.00
Customer Support Rep	2	\$18.00 - \$20.00	\$0.00
Sales Rep	2	\$20.00 - \$30.00	\$0.00
Warehouse	2	\$18.00 - \$20.00	\$0.00
Los Angeles County - 8431 Santa Monica Blvd, West Hollywood (ETP Required Wage: \$16.96)			
Accounting/Finance	5	\$30.00 - \$50.00	\$0.00
Human Resources	5	\$20.00 - \$30.00	\$0.00
Information Technology	5	\$30.00 - \$50.00	\$0.00
Marketing	5	\$30.00 - \$50.00	\$0.00
Operations Support	2	\$30.00 - \$50.00	\$0.00
Purchasing	15	\$30.00 - \$40.00	\$0.00
Sales Support	15	\$30.00 - \$50.00	\$0.00
Los Angeles County - 9210 De Soto Avenue, Chatsworth (ETP Required Wage: \$16.96)			
Branch Management	2	\$40.00 - \$50.00	\$0.00
Customer Support Rep	2	\$18.00 - \$20.00	\$0.00
Sales Rep	2	\$20.00 - \$30.00	\$0.00
Warehouse	2	\$18.00 - \$20.00	\$0.00
Monterey County/HUA - 3 Rossi Circle, Salinas (ETP Required Wage: \$16.16)			
Branch Management	2	\$40.00 - \$50.00	\$0.00
Customer Support Rep	2	\$18.00 - \$20.00	\$0.00
Sales Rep	2	\$20.00 - \$30.00	\$0.00
Warehouse	2	\$18.00 - \$20.00	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

Attachment 1 - Group and Job Title Details

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

Orange County - 1400 S. State College Blvd, Anaheim (ETP Required Wage: \$17.22)			
Branch Management	2	\$40.00 - \$50.00	\$0.00
Customer Support Rep	2	\$18.00 - \$20.00	\$0.00
Sales Rep	2	\$20.00 - \$30.00	\$0.00
Warehouse	2	\$18.00 - \$20.00	\$0.00
Riverside County - 42092 Winchester Blvd., Temecula (ETP Required Wage: \$16.16)			
Branch Management	2	\$40.00 - \$50.00	\$0.00
Customer Support Rep	2	\$18.00 - \$20.00	\$0.00
Sales Rep	2	\$20.00 - \$30.00	\$0.00
Warehouse	2	\$18.00 - \$20.00	\$0.00
Riverside County - 525 Cardiff St, Corona (ETP Required Wage: \$16.16)			
Branch Management	2	\$40.00 - \$50.00	\$0.00
Customer Support Rep	2	\$18.00 - \$20.00	\$0.00
Sales Rep	2	\$20.00 - \$30.00	\$0.00
Warehouse	2	\$18.00 - \$20.00	\$0.00
Riverside County - 77588 El Duna Court, Palm Desert (ETP Required Wage: \$16.16)			
Branch Management	2	\$40.00 - \$50.00	\$0.00
Customer Support Rep	2	\$18.00 - \$20.00	\$0.00
Sales Rep	2	\$20.00 - \$30.00	\$0.00
Warehouse	2	\$18.00 - \$20.00	\$0.00
Sacramento County - 9819 Business Park Drive, Sacramento (ETP Required Wage: \$16.46)			
Branch Management	2	\$40.00 - \$50.00	\$0.00
Customer Support Rep	2	\$18.00 - \$20.00	\$0.00
Sales Rep	2	\$18.00 - \$20.00	\$0.00
Warehouse	2	\$18.00 - \$20.00	\$0.00
San Bernardino County - 5300 Shea Center Drive, Ontario (ETP Required Wage: \$16.16)			
Customer Support Rep	10	\$17.00 - \$20.00	\$0.00
Supervisor	10	\$20.00 - \$25.00	\$0.00
Warehouse	10	\$17.00 - \$20.00	\$0.00
San Diego County - 1040 Los Vallecitos Blvd, San Marcos (ETP Required Wage: \$16.72)			
Branch Management	2	\$40.00 - \$50.00	\$0.00
Customer Support Rep	2	\$18.00 - \$20.00	\$0.00
Sales Rep	2	\$20.00 - \$30.00	\$0.00
Warehouse	2	\$18.00 - \$20.00	\$0.00
San Diego County - 6350 Miramar Road, San Diego (ETP Required Wage: \$16.72)			
Branch Management	2	\$40.00 - \$50.00	\$0.00
Customer Support Rep	2	\$18.00 - \$20.00	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

Attachment 1 - Group and Job Title Details

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

Sales Rep	2	\$20.00 - \$30.00	\$0.00
Warehouse	2	\$18.00 - \$20.00	\$0.00
<i>Santa Clara County - 2109 Bering Drive, San Jose (ETP Required Wage: \$17.63)</i>			
Branch Management	2	\$40.00 - \$50.00	\$0.00
Customer Support Rep	2	\$18.00 - \$20.00	\$0.00
Sales Rep	2	\$20.00 - \$30.00	\$0.00
Warehouse	2	\$18.00 - \$20.00	\$0.00
<i>Solano County - 815 Chadbourne Road, Fairfield (ETP Required Wage: \$16.16)</i>			
Branch Management	2	\$40.00 - \$50.00	\$0.00
Customer Support Rep	2	\$18.00 - \$20.00	\$0.00
Sales Rep	2	\$20.00 - \$30.00	\$0.00
Warehouse	2	\$18.00 - \$20.00	\$0.00
<i>Sonoma County - 237 Todd Road, Santa Rosa (ETP Required Wage: \$16.16)</i>			
Branch Management	2	\$40.00 - \$50.00	\$0.00
Customer Support Rep	2	\$18.00 - \$20.00	\$0.00
Sales Rep	2	\$20.00 - \$30.00	\$0.00
Warehouse	2	\$18.00 - \$20.00	\$0.00
<i>Stanislaus County/HUA - 4459 Spyers Way, Modesto (ETP Required Wage: \$12.12)</i>			
Branch Management	2	\$40.00 - \$50.00	\$0.00
Customer Support Rep	2	\$18.00 - \$20.00	\$0.00
Sales Rep	2	\$20.00 - \$30.00	\$0.00
Warehouse	2	\$18.00 - \$20.00	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>	
Training Type (Level)	Planned Course Offerings	
Business Skills	Customer Claims	
	Marketing	
	Product Knowledge	
	Resources/Structure/Culture	
	Selling Techniques	
<i>Delivery Method /Level</i>	<i>E-Learning – Instructor Led/Distance Learning</i>	
Training Type (Level)	Planned Course Offerings	
Business Skills	Freight Management	
	Operational Standards	
	Order Fulfillment Cycle	
	Pricing	
	Sales Reporting	
	Warehouse Operations	
<i>Delivery Method /Level</i>	<i>E-Learning – Computer Based Training (CBT)</i>	
Training Type (Level)	Planned Course Offerings	Standard Hours
Computer Skills	JD Edwards	30.00
	Product Knowledge	30.00



**TRAINING PROPOSAL FOR
FRESNO SURGERY CENTER, L.P.
17-0930**

Panel Meeting Date: 10/27/2017
Regional Office: Sacramento Regional Office
Analyst Name: Karen Smiley
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: \$240,256.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$271,360.00	N/A	\$31,104.00 (15% Group 1)	\$275,000.00

APPLICANT PROFILE

Company Summary	Fresno Surgery Center, L.P. dba Fresno Surgical Hospital (Fresno Surgical), is a licensed 30-bed hospital located in Fresno. The Company offers outpatient surgery procedures and provides overnight post-surgical care services to patients.
------------------------	---

Industry Sector(s)	Healthcare
Priority Industry	Yes
No. Employees (Applicant)	State: 374 US: 374 World Wide: 374
Turnover Rate (Applicant)	7.88 %
Repeat Contractor	Yes

High Unemployment Area	Yes
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Training will focus on Medical Skills to improve overall patient care. The Company is also opening an Urgent Care facility at the same location and training for this new department will be an emphasis of their training plan as well.
------------------------------	--

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	288	\$ 18.00	40	\$ 720	8 - 200
2	Job Creation – Retrainee Initiative Program, Retrainee	40	\$ 20.00	80	\$ 1600	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 1984, Fresno Surgical is a private, acute care hospital that serves the central valley. Initially, the Hospital operated as an outpatient surgery center, but later expanded its services to include overnight post-surgical care. The Hospital serves patients from Fresno, Madera, Kings, Merced and Tulare counties. Fresno Surgical services include surgical procedures in the area of Orthopedics, Bariatric Surgery, Ophthalmology, and outpatient therapy for patients.

2. Current Training Project Details

Purpose of Training	<p>This will be Fresno Surgical's third ETP Agreement and the third in the past five years. The bulk of training under this proposal will focus on Medical Skills training and the opening of a new Urgent Care facility. Fresno Surgical's 2013 ETP Agreement focused training on newly purchased hospital equipment. It's 2016 ETP Agreement focused training on the newly implemented Hospital Incident Command System (HICS) to ensure staff were prepared to assist in catastrophic emergencies.</p> <p>Training will also cover internal administrative processes, increasing customer satisfaction and enhancing knowledge of internal software systems. Training on internal process will increase business efficiencies and increase customer satisfaction. Computer training will be provided to ensure staff can effectively use internal software programs, such as ePREOP, MEDITECH, and Quantros used to track patient treatment plans and health history.</p>
Training Infrastructure and Administrative Plan	<p>The Company's current training budget is approximately \$275,000 per year. Training programs include new hire orientation, sexual harassment prevention, safety training, annual computer skills training, skills updates and in-service training. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.</p> <p>The Human Resources Manager and two administrative assistants will coordinate training, track performance and collect ETP Rosters. Fresno Surgical has also contracted with Strategic Business Solutions Inc. to assist with project administration. SBS will assist with all administration duties in relation to the ETP Agreement.</p>
Marketing Plan (MEC Only)	N/A

PROPOSED TRAINING PROJECT DETAILS

Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	<p>Fresno Surgical is a repeat contractor with payment earned in excess of \$250,000 in the past five years, at the hospital's only location in Fresno. Accordingly, reimbursement for incumbent trainees at this location will be reduced by 15% to reflect the Company's Substantial Contribution to the cost of training.</p> <p>Trainees in Group Number 2 (Job Creation) are not be subject to Substantial Contribution.</p>

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations will receive job specific training in Business, Computer, Continuous Improvement, and Hazardous Materials skills. Nursing Medical Staff will receive Didactic Medical skills training as listed under Attachment 2.	

Delivery Method/Level	Productive Laboratory – Medical Skills (Preceptor)
Summary	
Nursing Medical Staff will receive Medical Skills Preceptor training.	

4. Additional Company or Training Project Details

Medical Skills Training

Medical Skills clinical training will be delivered to Nursing Medical Staff in Group Numbers 1 and 2 using both the Didactic and Preceptor method of training delivery. The instructor-preceptor will first demonstrate a clinical skill and then monitor trainees as they perform in a hands-on environment. This training will be reinforced with classroom coursework. The Panel has established a higher reimbursement rate of \$22 per hour for nurse upgrade training, recognizing the higher cost of delivery for the Clinical Preceptor and Didactic models. Training will include Medication Safety, Airway Management and Operating Room Tech Skills

In this ETP Agreement, training will focus on the medical skills needed for trainees to be successful in their positions at the Hospital and new urgent care facility. Training will include Anesthesia Protocols, Catheter Protocols, Infection Control, Patient Assessment and Care and Pain Management to ensure trainees have the skills to provide quality healthcare within the community. Training on Medical Skills will be provided to allied healthcare staff.

PROPOSED TRAINING PROJECT DETAILS

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.

Fresno Surgical has broken ground on a new out-patient care facility that will open February 2018. This new facility is intended to increase access to medical care for the community while reducing the patient load in the area. The new facility is a 5,000 square feet addition to the Hospital and Fresno Surgical has invested over a million dollars in construction costs. Hiring and training is required to staff the new facility and provide quality healthcare to patients.

Fresno Surgical has committed to hiring 40 new Medical Support Staff and Nursing Staff (Group Number 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

4.1 Program Waivers

Waivers are provided below.

Waivers	Description
High Unemployment Area	<p>All trainees work in a High Unemployment Area (HUA), with unemployment exceeding the state average by 25%. The Hospital's location in Fresno County which qualifies for HUA status under these standards.</p> <p>Incumbent trainees in Group Number 1 qualify for the ETP Reduced Standard Wage of \$12.12 and Job Creation trainees in Group Number 2 qualify for the reduced standard wage of \$10.50 rather than the Statewide Average Hourly Wage of \$22.04 per hour.</p> <p>Fresno Surgical is requesting a wage modification for 90 trainees in Group Numbers 1 and 2.</p>

4.2 Subcontractor Summary

The Hospital retained the following Subcontractor.

PROPOSED TRAINING PROJECT DETAILS

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Strategic Business Solutions, LLC	Visalia	\$8,250.00
Administrative	Strategic Business Solutions, LLC	Visalia	13% of payment earned
Training	N/A	N/A	N/A

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
ET16-0106	Fresno	8/3/12 – 8/2/14	\$229,920	\$175,710.00	76%
Notes	Fresno Surgical has already earned \$175,710 with a final invoice pending for \$59,437.25. Fresno Surgical is projected to earn 100% of the funding amount once the final closeout invoice has been finalized.				
ET13-0216	Fresno	11/26/12 – 11/25/14	\$135,000	\$120,543.00	89%

4.4 Supporting Panel Proposal Documentation

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

Attachment 1 - Group and Job Title Details

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

Group # 1: Retrainee			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
<i>Fresno County/HUA - 6125 N. Fresno Street, Fresno (ETP Required Wage: \$12.12)</i>			
Administrative Staff	18	\$16.00 - \$30.00	\$0.00
Ancillary Medical Staff	97	\$13.50 - \$37.00	\$0.00
Clinical Lab Scientist	1	\$45.00 - \$69.00	\$0.00
Dietary Staff	9	\$12.12 - \$21.00	\$0.00
Facilities Management and Maintenance Staff	3	\$20.00 - \$37.00	\$0.00
Front Line Managers	28	\$30.00 - \$59.00	\$0.00
Housekeeping Staff	20	\$12.12 - \$19.00	\$0.00
Information Technology Staff	4	\$20.00 - \$35.00	\$0.00
Nursing Medical Staff	103	\$23.75 - \$49.75	\$0.00
Pharmacist	4	\$75.00 - \$77.00	\$0.00
Physical Therapist	1	\$40.00 - \$52.00	\$0.00

Group # 2: Retainee/Job Creation -Retrainee Initiative Program			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
<i>Fresno County/HUA - 6125 N. Fresno Street, Fresno (ETP Required Wage: \$10.50)</i>			
Medical Support JC	20	\$13.00 - \$32.00	\$0.00
Nursing Medical Staff JC	20	\$23.00 - \$49.00	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Advanced Customer Service Skills
	Conflict Management and Resolution
	Effective Communication Skills
	Healthcare Administration Best Practices
Computer Skills (Standard)	ePREOP Software Training
	MEDITECH Training
	Quantros Software Training
Continuous Improvement Skills	Food Product Safety
	Leadership Skills
	Preceptor Skills Training
	TeamBuilding
Hazardous Materials Skills	Hazardous Drugs Handling and Disposal
	Hazardous Waste Management
Medical Skills (didactic)	Advanced Cardiac Life Support
	Ancillary Medical Skills
	Anesthesia Protocols
	Basic Life Support
	Blood Transfusion
	Catheter Protocols
	Code Blue Response
	Hemodynamic Monitoring
	HIPAA
	Infection Control
	Laser Safety Protocols
	Medical/Surgical Nursing Skills
	Medication Safety
	New Graduate Nursing Skills
	Nurse Orientation Training
	Nursing Diagnosis Skills
	Nursing Process Skills
	Operating Room Nursing Skills
	PACU Nursing Skills
	Pain Management
	Patient Assessment and Care
	Physical Therapy Training
	Pre-Op Nursing Skills
	Radiology Safety Protocols
	Rapid Response Skills and Procedures
	Respiratory Care
	Sterilization Process and Protocols
	Surgical Nursing Skills Pre-Op

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	Productive Laboratory		
Training Type (Level)	Planned Course Offerings		
Medical Skills (preceptor)	Airway Management		
	Anesthesia Protocols		
	Catheter Protocols		
	Laser Safety Protocols		
	Medical Fire Safety		
	Medication Safety		
	MedSurg Nursing Skills		
	MedSurg Patient Care Tech Training		
	Operating Room Tech Skills		
	Orthopedic Nursing Skills		
	Patient Assessment Care		
	Patient Charting		
	Pre Admission Testing Nursing Skills		
	Pre- and Post-Operative Care		
	Pre-Op and PACU Nursing Skills		
	Pre-Op Nursing Skills		
	Radiology Skills		
	Sterile Processing Technician Skills		
	Surgical Nursing Skills		
	Trauma Nursing Skills		
	Universal Protocols		
PL Justification and Details			
Explain the need for productive laboratory (PL) training	Medical Skills preceptor training must be taught in a live atmosphere with the continuous oversight of a Preceptor until skills can be checked and deemed proficient.		
Describe the Equipment/Processes to be used in delivering the PL training	Medical Equipment of various forms that are needed to complete each individuals duties in the hospital. It may be equipment or various other devices such as a catheter, an I.V., or a Pulse OX Monitor.		
Describe Trainer Qualifications	Trainers will be certified as subject matter experts in the various skills being taught. In addition, they will have completed preceptor skills training which will certified them as competent in teaching methods, coaching, mentoring, and skills checks.		
Trainer to Trainee Ratios - If more than one PL class the ratios are the lowest and the highest trainer-to-trainee ratio		Trainer	Trainee
Ratio for One Class, or Minimum When More than One Class		1 2	
Ratio for Maximum Ratio When More than One Class		1 2	
PLT Approval	Yes		



Training Proposal for:

Giligia College

Agreement Number: ET18-0137

Panel Meeting of: October 27, 2017

ETP Regional Office: North Hollywood

Analyst: M. Paccarelli

PROJECT PROFILE

Contract Attributes:	Retrainee SET Priority Rate New Hire	Industry Sector(s):	Services Healthcare 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		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
\$66,240		\$4,272 8%		\$70,512

In-Kind Contribution:	50% of Total ETP Funding Required	\$50,490
-----------------------	-----------------------------------	----------

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	New Hire SET Multiple Barriers	Business Skills, Computer Skills, Continuous Imp.	15	8-200	0	\$4,256	\$14.13
				Weighted Avg: 200			
2	Retrainee Priority Rate SB<100	Business Skills, Computer Skills, Continuous Imp.	3	8-60	0	\$1,112	\$16.96
				Weighted Avg: 40			
3	Retrainee SET Priority Rate SB<100	Business Skills, Computer Skills, Continuous Imp.	3	8-60	0	\$1,112	\$22.04
				Weighted Avg: 40			

Minimum Wage by County: Job Number 1: \$14.13 per hour in Los Angeles County; Job Number 2: \$16.96 per hour in Los Angeles County; Job Number 3: \$22.04 per hour Statewide

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

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1:		
Medical Biller/Coder/Administrative Assistant	\$14.13 - \$32.00	15
Job Number 2:		
Medical Biller/Coder	\$16.96 - \$32.00	2
3D Modeling Staff	\$16.96 - \$32.00	1
Job Number 3:		
Medical Biller/Coder	\$22.04 - \$32.00	3

INTRODUCTION

Founded in 2006, Giligia College (Giligia) (www.giligiacollege.com) is a for-profit training agency providing professional studies and career-related programs. Giligia's programs includes medical billing, multimedia, environmental communication, pharmacy technician, information technology, and Vocational English classes. However, this proposal will only utilize the medical billing, office administration, and multimedia design programs. The school is also seeking funds to place unemployed individuals with multiple barriers to employment. This will be Giligia's second ETP proposal and the second within the last five years.

PROJECT DETAILS

Giligia keeps informed about employer needs through meetings with participating employers in order to identify specific training and industry-related demands. Several employers indicated the need to improve workers' skills in medical billing systems and computers applications. Additionally, office skills were determined to be equally important as workers needed to improve interactions with internal and external customers. As a result, Giligia crafted a comprehensive training program that can be customized to meet specific training needs of each employer.

For the New Hire training, Giligia has been training and placing unemployed individuals for several years and has established a network of companies that contact the school on a regular basis in search of trainees prepared to enter the workforce. Giligia met with 40 to 50 employers to allow them the opportunity to make recommendations for the curriculum. Giligia provides opportunities for trainees to supplement training through internship programs while training.

Marketing and Support Costs

Giligia's marketing and recruitment efforts include direct contact with local employers, word of mouth referrals, job fairs, mailers, publications, and community organizations. The school also participates in community workshops and presentations hosted by the San Fernando Chamber of Commerce.

Giligia also allocates resources to perform needs assessments, recruitment, and curriculum customization based on employer feedback. Giligia is requesting support costs to fund extensive marketing efforts, recruitment of additional participating employers, and placement for new hire trainees. Staff recommends the 8% Support Costs.

Training Plan

Business Skills (20%) – Training will be offered to all occupations which will focus on communication skills and customer service.

Computer Skills (60%) – Training will be offered to all occupations which includes Microsoft Office applications and medical billing systems.

Continuous Improvement (20%) – Training will be offered to all occupations designed to enhance teamwork, problem solving, and decision making skills.

Training Agency Certification

To qualify for ETP-funded training, a training agency must have been in existence for a minimum of two years preceding its application for funding and have an established history of providing training to the public. Giligia meets this requirement since it has been servicing the public since 2006. Giligia is certified as a training agency by the BPPE.

Commitment to Training

Giligia represents that ETP funds will not displace the existing financial commitment to training by participating employers. ETP funding will allow structured training to occur that would not be possible otherwise due to budget constraints. Current training topics provided by employers include new employee orientation and mandated compliance matters. ETP funding will allow participating employers to offer formal, on-site training to their employees. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

Giligia's Chief Administrative Officer will oversee the implementation of this project. The College will also assign additional internal staff to coordinate marketing, recruitment, class scheduling, and rosters to ensure that project administration adheres to ETP requirements.

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.

➤ Wage Modification

Trainees in Job Number 1 have two or more barriers to employment (e.g., mental or physical disability, limited English proficiency, limited math skills). These trainees qualify for a wage modification to the ETP Minimum Wage instead of the Statewide Average Hourly Wage. Giligia is requesting this modification.

Tuition Reimbursement

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

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

N/A

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned
ET16-0169	Los Angeles	10/01/15 – 09/30/17	\$216,900	\$116,309*

The ETP Online System shows an earned approved amount of \$116,309. However, Giligia is still in the process of submitting a Final Closeout Invoice. Based on the ETP System, Giligia has provided 16,419 hours for potential earnings of \$216,900 (100% of the Agreement amount).

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

8–200

Trainees may receive any of the following:

BUSINESS SKILLS

- + Communication Skills
- + Customer Service
- + Performance Management Skills

COMPUTER SKILLS

- + Microsoft Access
- + Microsoft Excel
- + Microsoft Outlook
- + Microsoft PowerPoint
- + Microsoft Word
- + Multimedia Software/Applications
- + QuickBooks
- + MediaSoft
- + Medical Billing Systems

CONTINUOUS IMPROVEMENT

- + Leadership Skills
- + Problem Solving
- + Team Building

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: Giligia College

CCG No.: ET18-0137

Reference No: 17-0046

Page 1 of 1

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Allstar Billing Solutions

Address: 121 W. Lexington Drive

City, State, Zip: Glendale, CA 91230

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 4

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

Company: California Eye Center Optometry

Address: 14624 Sherman Way Ste. 204

City, State, Zip: Van Nuys, CA 91405

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 6

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

Company: Suren Chtchyan DDS MS

Address: 3727 W Sunset Blvd.

City, State, Zip: Los Angeles, CA 90026

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 3

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

Company: Unique World

Address: 10537 Glenoaks Blvd.

City, State, Zip: Pacoima, CA 91331

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 6

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



Training Proposal for:
Greater San Fernando Valley Chamber of Commerce

Agreement Number: ET18-0136

Panel Meeting of: October 27, 2017

ETP Regional Office: North Hollywood

Analyst: L. Vuong

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee SB <100 SET HUA	Industry Sector(s):	Manufacturing Construction Engineering Healthcare Services Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles, Orange, Ventura	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No International Brotherhood of Boilermakers, Iron Shipbuilders, Blacksmiths, Forgers and helpers, Metals Polishers Division Local #67		
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		≤20%	

FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$175,120		\$12,056 8%		\$187,176

In-Kind Contribution:	50% of Total ETP Funding Required	\$99,240
-----------------------	-----------------------------------	----------

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Continuous Impr.	116	8-200	0	\$577	\$16.16
				Weighted Avg: 30			
2	Retrainee Priority 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			

*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, 2, and 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.

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

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Numbers 1-4		
Administration Staff	\$14.00 - \$30.00	50
Operator	\$14.00 - \$43.00	40
Production Worker	\$14.50 - \$35.00	53
Engineer I	\$30.00 - \$50.00	8
Engineer II	\$50.01 - \$70.00	7
Manager/Supervisor I	\$18.00 - \$45.00	20

Manager/Supervisor II	\$45.01 - \$70.00	20
Shop Lead I	\$16.00 - \$30.00	25
Shop Lead II	\$30.01 - \$50.00	25
Customer Service Staff	\$14.00 - \$30.00	30
Small Business Owner (Jobs 2-4)	N/A	4

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.

Serving the Latino business community for 21 years, the Greater San Fernando Chamber has connected this diverse market with potential customers through its Latino Expo, drawing over 25,000 people to the event annually. The Chamber is actively involved in promoting business interests, with programs targeted to small, large, micro, women and minority-owned businesses as well as the Latino market. Greater San Fernando Chamber sees a greater need for making the existing businesses more competitive, not only in the local community but also in surrounding cities and regions.

PROJECT DETAILS

Greater San Fernando Chamber is focused on economic growth, job creation and retention in the San Fernando Valley and neighboring cities/counties. Its goal for the next 24 months is to “source” collaborative partners to create best practices in job creation and retention. One project includes identifying at-risk businesses and working with the city councilmembers representing those areas to find out what can be done to assist them.

Training will be offered to employers throughout the Southern California. The majority of training (95%) will be conducted at participating employer locations while the remainder will be at Greater San Fernando Chamber.

Union Support

Included in the core group of employers are trainees represented by International Brotherhood of Boilermakers, Iron Shipbuilders, Blacksmiths, Forgers and helpers, Metals Polishers Division Local #67. ETP has received letter of support from Local #67.

Training Plan

The Chamber’s curriculum is designed to serve the needs of a diverse workforce by allowing each company to customize training. The core group of participating employers has expressed a need to improve social media training. The core group represents 100% of requested funding for this proposal.

Business Skills (40%): Training will be provided to all occupations to improve communication skills, customer relations, business writing skills and business problem solving.

Computer Skills (20%): Training will be provided to all occupations to learn how to effectively use the Company's internal software applications to design, program, implement, and troubleshoot new computer software programs such as social media, accounting software, and Microsoft suite.

Continuous Improvement (40%): Training will be provided to all occupations to promote teamwork and improve workflow, troubleshooting, and problem solving. Training includes process mapping, Lean Enterprise topics, and ISO Auditor compliance training.

Special Employment Training-High Unemployment Area (SET-HUA)

Under Special Employment Training (SET), a participating employer is not required to demonstrate out-of-state competition and trainees are not required to meet eligibility standards for retraining. This proposal has been identified for SET funding under Job Number 4.

All trainees in Job Number 4 work in a High Unemployment Area (HUA) with unemployment exceeding the state average by at least 25%. Companies located in Los Angeles County (East Los Angeles, Palmdale and Huntington Park City) qualify for HUA status and thus, qualify for the Standard Minimum Wage instead of the Statewide Average Hourly Wage.

➤ Wage Modification

For trainees in Job Number 4, the Panel may modify the ETP Standard Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. Greater San Fernando Chamber is asking for a wage modification to the HUA Minimum Wage of \$12.72 for these trainees. Job Number 4 post-retention wages must be higher than the start-of-training wages.

Impact/Outcome

Greater San Fernando Chamber training will help participating employers to prepare for certification programs such as ISO, Lean Enterprises and Six Sigma that are typically awarded based on training and internal improvement. These certifications often lead to new market opportunities, new customers, and increased sales, which will ultimately help companies grow and provide workforce stability.

Commitment to Training

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

Most of the participating employers lack the resources and funding to conduct formal and structured training, especially small companies. The majority provide on-the-job, one-on-one training to new employees, safety, and off-site seminar training. ETP funding will allow these companies to provide a larger number of employees with a broader spectrum of skills development, introduce new business practices and services in order to sustain growth and remain competitive in California. The Chamber will only provide training to participating employers in subjects that are outside of their expertise.

➤ **Training Infrastructure**

Greater San Fernando Chamber and DLI & Associates LLC will share 100% of the administrative services. The Chamber has identified two training vendors, Custom Corporate Communications and Western Training Group to provide large portion of the training. Additional outside training vendors may be identified during the term of the proposed Agreement if needed. Neither vendor will be reimbursed for more than 50% of the training cost.

Both Custom Corporate Communications and Western Training Group are scheduled to provide on-site training in Continuous Improvement, Business and Computer Skills at participating employer locations. Training instructors have industry experience and carry vendor specific certifications.

Marketing and Support Costs

Over the years, Greater San Fernando Chamber has established relationships with other chambers, community members, Valley Industry & Commerce Association, The Valley Economic Alliance and collaborative networks of businesses. The Chamber hosts monthly meetings and uses newsletters, websites, and email communication to promote business opportunities, procurement news, government-assisted programs, and various networking events. The Chamber has three employees dedicated to marketing, recruiting, assessment, scheduling, and training; therefore, the Chamber seeks full support cost of 8% to fund extensive marketing efforts to recruit additional participating employers and assessment activities of employers. Staff believes 8% support costs are justified in this proposal.

Substantial Contribution

Greater San Fernando Chamber serves large and small companies, some of which may have received training in prior ETP contracts. If a large participating employer has received the benefit of training with payment earned in excess of \$250,000 within the past five years, reimbursement for trainees at the same facility will be reduced by 30% to reflect a substantial contribution to the cost of training. Funding for any employer that has previously been assessed a substantial contribution will be reduced by 50%. Small businesses are not subject to this provision.

Training Coordinator

Greater San Fernando Chamber has designated one staff member to overs project administration. The Chamber has also retained a consultant to assist in administration.

Tuition Reimbursement

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

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

DLI & Associates LLC in San Juan Capistrano assisted with development at no cost.

ADMINISTRATIVE SERVICES

DLI & Associates LLC will also perform administrative services for a fee not to exceed 10% of payment earned.

TRAINING VENDORS

Custom Corporate Communications in Redondo Beach and Western Training Group in Playa Del Rey have been retained to provide training for a fee to be determined. Additional outside training vendors maybe identified and retained during the term of the Agreement. No one vendor will deliver more than 50% of total training hours under this proposal.

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

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Marmol Radziner, Prefab

Address: 1142 E. Grand Ave.

City, State, Zip: El Segundo, CA 90245

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 16

Total # of full-time company employees worldwide: 38

Total # of full-time company employees in California: 38

Company: Marmol Radziner, An Architectural Corporation

Address: 12210 Nebraska Ave.

City, State, Zip: Los Angeles, CA 90025

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 16

Total # of full-time company employees worldwide: 161

Total # of full-time company employees in California: 161

Company: De Rigo REM

Address: 10941 La Tuna Canyon Road

City, State, Zip: Sun Valley, CA 91352

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 80

Total # of full-time company employees worldwide: 99

Total # of full-time company employees in California: 99

Company: TriMed, Inc

Address: 27533 Avenue Hopkins

City, State, Zip: Santa Clarita, CA 91355

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 57

Total # of full-time company employees in California: 47

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: Valex

Address: 6080 Leland Street

City, State, Zip: Ventura, CA 93003

Collective Bargaining Agreement(s): International Brotherhood of Boilermaker, Iron Shipbuilders, Blacksmiths, Forgers and helper, Metal Polishers Division, Local 67

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

Total # of full-time company employees worldwide: 250

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

Company: Valley Plating Works Inc.

Address: 5900 Sheila Street

City, State, Zip: Commerce, CA 90040

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 84

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

Company: Venture - VM Services Inc.

Address: 1051 S. East St.

City, State, Zip: Anaheim CA 92805

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 13,000

Total # of full-time company employees in California: 350

International Brotherhood of Boilermakers, Iron Shipbuilders, Blacksmiths, Forgers and helpers, Metals
Polishers Division
A.F.L- C.I.O – C.F.L.
Local #67

August 11, 2017

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

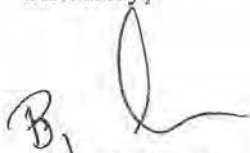
Dear ETP,

I am writing on behalf of the International Brotherhood of Boilermakers, Iron Shipbuilders, Blacksmiths, Forgers and helpers, Metals Polishers Division, Local #67 membership. We support the proposed training funded in part by the Employment Training Panel:

- Basic math and production skills
- Communication skills
- Continuous Improvement training (Lean, Six Sigma, 5S)
- Management Skills (Leadership Development)

This training will assist our company in meeting our goals.

Sincerely,



Brian Espinoza
President



TRAINING PROPOSAL FOR

Gumbiner Savett Inc. Certified Public Accountants & Business Advisors

17-0562

Panel Meeting Date: 10/27/2017

Regional Office: North Hollywood Regional Office

Analyst Name: Mark Reeves

Type of Proposal: Single Employer (SB), Small Business Program

Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$ 62,480.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 62,480.00	N/A	\$ 0.00	\$ 113,000.00

APPLICANT PROFILE

Company Summary	Gumbiner Savett Inc. Certified Public Accountants & Business Advisors (GS) is a full-service accounting firm. The Company is headquartered in Santa Monica.
------------------------	---

Industry Sector(s)	Professional, Scientific, and Technical		
Priority Industry	No		
No. Employees (Applicant)	State: 90	US: 90	World Wide: 90
Turnover Rate (Applicant)	4.00 %		
Repeat Contractor	No		
High Unemployment Area	No		
Union(s)	No		

TRAINING PROFILE

Training Objective(s)	GS must ensure that its staff is up to date on current laws, regulations, and requirements involving tax, audit, and management services.
------------------------------	---

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	71	\$ 22.00	40	\$ 880	8 - 60

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 1950, and located in Santa Monica, GS is an accounting firm that provides audit and assurance, tax, business and advisory services, and litigation support. The Company's clients range from individuals and families to private and public middle-market companies. GS serves an array of industries including agriculture, apparel, construction, manufacturing/distribution, media/entertainment.

2. Current Training Project Details

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

Purpose of Training	<p>In order to provide reliable, technically sound service to clients, GS employees need to be well versed in the latest accounting rules, tax issues, and business plans.</p> <p>The Company has identified three key areas for staff development and business improvement:</p> <ul style="list-style-type: none">• Tax - Staff needs to be familiar with tax planning strategies that will help clients improve their profits.• Audit - Staff needs to be knowledgeable and skilled at helping clients remain in good standing despite constantly changing financial regulations.• Management services –Staff need to develop a thorough understanding of solid business principles in order to become competent advisors. <p>Training will take place at the GS location in Santa Monica. Instruction will primarily be provided by in-house subject matter experts. The Company may also utilize outside training vendors for unique situations.</p> <p>GS will be training 10 Partners under this ETP project. However, the ETP Small Business Program currently allows top level executives who set company policy to be included for training, of which all the Partners fall into this category.</p>
Training Infrastructure and Administrative Plan	<p>GS has an annual training budget of approximately \$125,000. The Company's Director of Practice Development will handle internal project administration. GS also retained an administrative consultant to ensure that all training and documentation adhere to ETP requirements.</p>

PROPOSED TRAINING PROJECT DETAILS

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

3. Curriculum Summary

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

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

Delivery Method/Level	E-Learning - Instructor Led/Distance Learning
Summary	
Accountants and Partners will receive Commercial Skills.	

4. Additional Company or Training Project Details

4.1 Program Waivers

No waivers have been requested by the Company.

4.2 Subcontractor Summary

GS has retained the services of the following Subcontractor(s).

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Training Refund Group	Anaheim	\$5,000.00
Administrative	Training Refund Group	Anaheim	13% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

GS has no previous ETP contracts.

4.4 Supporting Panel Proposal Documentation

PROPOSED TRAINING PROJECT DETAILS

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 1 - Group and Job Title Details

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

Group # 1: Retrainee			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
<i>Los Angeles County - 1723 CLOVERFIELD BLVD, Santa Monica (ETP Required Wage: \$16.96)</i>			
Accountant 1	16	\$18.00 - \$28.00	\$0.00
Accountant 2	21	\$18.00 - \$40.00	\$0.00
Accountant 3	9	\$35.00 - \$64.00	\$0.00
Accountant 4	5	\$65.00 - \$94.00	\$0.00
Administrative	10	\$18.00 - \$38.00	\$0.00
Partner	10	\$90.00 - \$110.00	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

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 Writing
	Client Management
	Communication
	Leadership
	Presentation Skills
	Problem Resolution
Commercial Skills (Standard)	Accounting and Auditing
	Accounting and Fraud updates
	Employee Retirement Plans
	Federal and State tax update
	International Taxation
	Real Estate Taxation
	SEC compliance
	Tax Credits
	Tax Return Preparation
Computer Skills (Standard)	Adobe
	BNA Research
	Case Management software
	CCH Scanflow
	Intermediate MS office
	Profx tax software
	ProStaff GoFile Room and Scheduling
	Quickbooks
<i>Delivery Method /Level</i>	<i>E-Learning – Instructor Led/Distance Learning</i>
Training Type (Level)	Planned Course Offerings
Commercial Skills (Standard)	Accounting and Auditing Updates
	Accounting and Fraud updates
	Employee Benefit Plans
	Federal and state tax update
	International Taxation
	Real Estate Taxation
	SEC compliance
	Tax compliance
	Tax Credits



TRAINING PROPOSAL FOR

KCoe Isom, LLP

17-0729

Panel Meeting Date: 10/27/2017
Regional Office: Sacramento Regional Office
Analyst Name: Jana Lazarewicz
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$ 111,675.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 111,675.00	N/A	\$ 0.00	\$ 248,000.00

APPLICANT PROFILE

Company Summary	KCoe Isom, LLP (KCoe Isom) is a full service accounting and professional services firm.
------------------------	---

Industry Sector(s)	Professional, Scientific, and Technical		
Priority Industry	No		
No. Employees (Applicant)	State: 123	US: 360	World Wide: 360
Turnover Rate (Applicant)	0.57 %		
Repeat Contractor	No		
High Unemployment Area	Yes		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	KCoe Isom reports a continued increase in customer demand for accounting and professional services. The Company also has to keep up with rapid changes brought about by industry and government requirements. Training is needed to increase employee knowledge of regulatory changes, enhance technical skills, and improve performance.
------------------------------	---

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	\$ 15.00	55	\$ 825	8 - 200
2	Job Creation – Retrainee Initiative Program, Retrainee	25	\$ 20.00	60	\$ 1200	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 2015 and headquartered in Chico, KCoe Isom is a woman-owned full service accounting and professional services firm that specializes in tax, audit, financial reporting, wealth management, crop insurance, environmental credits, and business consulting. The Company core customer base is in the agriculture, manufacturing, bio-fuels, healthcare, energy, and technology industry sectors.

The Company has seven facilities in Butte, Colusa, Fresno, Shasta, Stanislaus, Sutter, and Yolo Counties, all of which will participate in the training proposal. This will be KCoe Isom's first ETP Agreement.

2. Current Training Project Details

Purpose of Training	<p>KCoe Isom's need for training is driven by increasing demand for services. Training in Business and Commercial Skills will focus on communication, leadership, sales and teambuilding to improve business processes. In addition, the Company has invested in a new project management system (STAR) and upgraded its internal tax software program (CCH Axcess). Training will help employees better navigate these systems, with implementation scheduled to be completed by year-end.</p> <p>Additionally, the Company must keep up with rapid changes brought about by industry and government requirements to ensure employees can deliver sound financial advice and tax planning strategies. Courses include Accounting and Auditing Updates, Tax Credits and Incentives, and Financial Accounting Standards.</p>
Training Infrastructure and Administrative Plan	<p>KCoe Isom has designated the Principal/Finance Leader as the central administrator, to plan, schedule, and ensure all aspects of training are uniformly implemented across all locations. Each location also has a designated person to collect rosters and implement the Company's training plan. In addition, the Company has retained the services of a third party administrative subcontractor to assist with all administrative 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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations will receive training applicable to their jobs in Business, Commercial, and Computer Skills as listed in Attachment 2, Exhibit B.	

Delivery Method/Level	E-Learning - Instructor Led/Distance Learning
Summary	
Some coursework will be delivered as E-Learning as shown in Attachment 2, Exhibit B.	

4. Additional Company or Training Project Details

Retrainee - Job Creation

KCoe Isom experienced 8.8% growth in the past year and anticipates 7% in annual revenue increases over the next two years. To further expand business capacity, the Company opened a new facility in Davis in July and will be hiring 25 new employees in key occupations (Group Number 2: Administrative Staff, Associate, Sr. Associate, and Project Managers). To be eligible for reimbursement under this Group Number, the trainees must be hired into full-time permanent positions within the three-month period prior to Panel approval or during the term of contract. These trainees will be hired into "net new jobs" as a condition of contract.

4.1 Program Waivers

Waivers	Description
None have been requested	

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Propel Consulting Group	El Dorado Hills	\$12,200
Administrative	Propel Consulting Group	El Dorado Hills	7.5% of payment earned
Training	None selected to date	N/A	N/A

PROPOSED TRAINING PROJECT DETAILS

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 1 - Group and Job Title Details

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

Group # 1: Retrainee			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
Butte County/HUA - 3013 Ceres Ave, Chico (ETP Required Wage: \$12.12)			
Administrative Staff	9	\$17.50 - \$30.00	\$0.00
Associate	27	\$17.50 - \$35.00	\$0.00
Project Manager	8	\$40.00 - \$55.00	\$0.00
Sr. Associate	8	\$20.00 - \$40.00	\$0.00
Sr. Project Manager	2	\$55.00 - \$75.00	\$0.00
Colusa County/HUA - 110 Sunrise Blvd, Suite A, Colusa (ETP Required Wage: \$12.12)			
Administrative Staff	1	\$17.50 - \$30.00	\$0.00
Associate	3	\$17.50 - \$35.00	\$0.00
Fresno County/HUA - 2520 W Shaw Lane, Suite 101, Fresno (ETP Required Wage: \$12.12)			
Administrative Staff	3	\$17.50 - \$30.00	\$0.00
Associate	8	\$17.50 - \$35.00	\$0.00
Project Manager	2	\$40.00 - \$55.00	\$0.00
Sr. Project Manager	3	\$55.00 - \$75.00	\$0.00
Shasta County/HUA - 1726 Court Street, Redding (ETP Required Wage: \$12.12)			
Associate	1	\$17.50 - \$35.00	\$0.00
Sr. Associate	2	\$20.00 - \$40.00	\$0.00
Stanislaus County/HUA - 865 Geer Rd, Turlock (ETP Required Wage: \$12.12)			
Administrative Staff	4	\$17.50 - \$30.00	\$0.00
Associate	4	\$17.50 - \$35.00	\$0.00
Project Manager	7	\$40.00 - \$55.00	\$0.00
Sr. Associate	1	\$20.00 - \$40.00	\$0.00
Sutter County/HUA - 11090 Civic Center Blvd, Yuba City (ETP Required Wage: \$12.12)			
Project Manager	1	\$40.00 - \$55.00	\$0.00
Yolo County - 1450 Drew Ave, Davis (ETP Required Wage: \$16.16)			
Administrative Staff	1	\$17.50 - \$30.00	\$0.00
Associate	4	\$17.50 - \$35.00	\$0.00

Group # 2: Retrainee/Job Creation – Retrainee Initiative Program			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

Attachment 1 - Group and Job Title Details

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

Butte County/HUA - 3013 Ceres Ave, Chico (ETP Required Wage: \$10.50)			
Administrative Staff - Job Creation	2	\$17.50 - \$35.00	\$0.00
Associate - Job Creation	10	\$17.50 - \$30.00	\$0.00
Project Manager - Job Creation	2	\$40.00 - \$55.00	\$0.00
Sr. Associate - Job Creation	3	\$30.00 - \$40.00	\$0.00
Fresno County/HUA - 2520 W Shaw Lane, Suite 101, Fresno (ETP Required Wage: \$10.50)			
Administrative Staff - Job Creation	1	\$17.50 - \$30.00	\$0.00
Associate - Job Creation	2	\$17.50 - \$30.00	\$0.00
Yolo County - 1450 Drew Ave, Davis (ETP Required Wage: \$13.22)			
Administrative Staff - Job Creation	1	\$17.50 - \$30.00	\$0.00
Associate - Job Creation	3	\$17.50 - \$30.00	\$0.00
Sr. Associate - Job Creation	1	\$30.00 - \$40.00	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

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	Anticipatory Organization
	Business Accumen
	Business Development
	Client Service
	Communication Skills
	Conflict Resolution
	Critical Thinking
	Engagement Requirements
	Leadership Development
	Networking
	Organization Techniques
	Problem Solving & Decision Making
	Project Management
	Time Management
	Value Creation
Commercial Skills (Standard)	Accounting & Auditing Update
	Accounting Essentials
	Audit & Accounting Techniques
	Audit Essentials
	Capitalized Costs & Depreciation
	Corporate Structures
	Financial Accounting Standards
	Financial Statements
	Foundation For Accounting
	International Issues
	Pricing Methods
	Project Review Techniques
	Tax Credits & Incentives
	Tax Law Update
	Tax Planning
	Tax Prepartion
Computer Skills (Standard)	Adobe
	CCH Axxess
	Intermediate/Advanced Microsoft Ofiice
	STAR Project Management
<i>Delivery Method /Level</i>	<i>E-Learning – Instructor Led/Distance Learning</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Anticipatory Organization
	Business Accumen
	Business Development
	Client Service
	Communication Skills
	Conflict Reolution
	Critical Thinking

Attachment 2 - Training Delivery and Curriculum Listing

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

Business Skills	Engagement Requirements
	Leadership Development
	Networking
	Organization Techniques
	Problem Solving & Decision Making
	Project Management
	Time Management
	Value Creation
Commercial Skills (Standard)	Accounting & Auditing Update
	Accounting Essentials
	Audit & Accounting Techniques
	Audit Essentials
	Capitalized Costs & Depreciation
	Corporate Structures
	Financial Accounting Standards
	Financial Statements
	Foundation For Accounting
	International Issues
	Pricing Methods
	Project Review Techniques
	Tax Credits & Incentives
	Tax Law Update
	Tax Planning
	Tax Preparation



TRAINING PROPOSAL FOR

Koos Manufacturing, Inc.

17-0872

Panel Meeting Date: 10/27/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Monique Webb
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$ 245,862.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 245,862	N/A	\$ 0.00	\$ 484,035.00

APPLICANT PROFILE

Company Summary	Koos Manufacturing, Inc. will be the lead contract holder with its subsidiary, AG Adriano Goldschmied, Inc. (both owned by the same owner.) Both companies are clothing manufacturers, retailers, and distributors and are located in the same building.
------------------------	--

Industry Sector(s)	Manufacturing
Priority Industry	Yes
No. Employees (Applicant)	State: 879 US: 987 World Wide: 987
Turnover Rate (Applicant)	4.00 %
Repeat Contractor	No
High Unemployment Area	Yes

Union(s)	N/A
-----------------	-----

TRAINING PROFILE

Training Objective(s)	The proposed training plan will allow the Company to upgrade the skills of its existing workforce, integrate newer employees, and implement process improvements. Training will enhance productivity, product quality, and overall efficiency.
------------------------------	--

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	471	\$ 18.00	30	\$ 540	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Koos Manufacturing Inc. (Koos), founded in 1985 and headquartered in South Gate, is a vertically integrated denim jeans manufacturer (every step, from design, cutting, sewing, washing, and finishing, is performed in one facility). This will be the Koos' first ETP Agreement.

2. Current Training Project Details

Purpose of Training	<p>Koos recently purchased new production equipment, including computerized laser cutting and measuring machines and various computer software systems to improve efficiency. Koos has also purchased printing equipment as the Company will be bringing all out-sourced printing in house. Training on printing, folding, binding, gluing and cutting machinery will enable workers to complete daily tasks and learn protocol to finish duties proficiently. Trainees will receive Manufacturing Skills to ensure proper operation and maintenance of these new equipment and systems.</p> <p>Additionally, Koos will expand business outreach to include creative services, mail and e-mail marketing, fulfillment, and integrated business solutions. The expanded business outreach will design and produce customized, full-color marketing and promotional materials such as business cards, brochures, postcards, and specialty die cuts. Trainees will receive Business Skills and Continuous Improvement training to improve marketing, management, and merchandising skills.</p>
Training Infrastructure and Administrative Plan	<p>The annual training budget for both companies is approximately \$484,035. Training will be delivered by in-house instructors and will take place at the Company's facilities in South Gate.</p> <p>The Communications Manager will be the dedicated internal administrator and will work alongside the administrative subcontractor to ensure adherence to ETP recordkeeping 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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations identified in Attachment 1 will receive training applicable to their jobs in Business, Commercial, Computer, Manufacturing, and Continuous Improvement topics listed under Attachment 2.	

4. Additional Company or Training Project Details

N/A

4.1 Program Waivers

Waivers	Description
HUA Wage Modification	The trainees in Group 1 work in a South Gate (Los Angeles County), a High Unemployment Area (HUA) with unemployment exceeding the state average by at least 25%. For these trainees, the Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. The Company is requesting a 25% wage modification, from \$16.16 per hour to \$12.12 per hour.

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Corporate Tax Incentives LLC	Rancho Cordova	\$22,127
Administrative	Corporate Tax Incentives LLC	Rancho Cordova	Not to exceed 11% 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 1 - Group and Job Title Details

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

Group # 1: Retrainee			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
Los Angeles County/HUA - 2741 SEMINOLE AVE, South Gate (ETP Required Wage: \$12.72)			
Brushing	82	\$12.72 - \$18.75	\$0.00
Bundle	3	\$12.72 - \$16.96	\$0.00
Cafeteria	2	\$12.72 - \$22.59	\$0.00
Cutting	13	\$12.72 - \$25.96	\$0.00
Fabric Warehouse	3	\$12.72 - \$21.15	\$0.00
Facility Management	3	\$12.72 - \$16.96	\$0.00
Finance & Accounting	2	\$12.72 - \$28.12	\$0.00
Finishing & Shipping	20	\$12.72 - \$22.00	\$0.00
Grading	1	\$35.09 - \$35.09	\$0.00
Information Technology	5	\$18.00 - \$40.00	\$0.00
Laundry	21	\$12.72 - \$30.00	\$0.00
Marketing	2	\$12.72 - \$24.03	\$0.00
Mechanic	9	\$12.72 - \$20.75	\$0.00
Payroll	1	\$12.72 - \$16.96	\$0.00
Research and Development	5	\$12.72 - \$19.00	\$0.00
Screen Print	2	\$12.72 - \$16.96	\$0.00
Sewing	170	\$12.72 - \$21.15	\$0.00
Sewing Mechanic	4	\$12.72 - \$16.96	\$0.00
Sewing Sample	29	\$12.72 - \$20.00	\$0.00
Trim	6	\$12.72 - \$16.96	\$0.00
Los Angeles County/HUA - 2741 SEMINOLE AVE, South Gate (ETP Required Wage: \$12.72)			
Account Management	12	\$12.72 - \$28.85	\$0.00
Accounting	4	\$19.23 - \$31.25	\$0.00
Design	18	\$12.72 - \$26.92	\$0.00
E commerce	7	\$12.72 - \$22.11	\$0.00
In House Production	5	\$17.00 - \$21.63	\$0.00
International Sales	1	\$25.00 - \$25.00	\$0.00
Merchandising	2	\$25.00 - \$25.00	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

Attachment 1 - Group and Job Title Details

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

Operations	1	\$26.44 - \$26.44	\$0.00
Pattern & Technical Design	5	\$12.72 - \$37.98	\$0.00
Production	2	\$21.15 - \$40.00	\$0.00
Public Relations & Marketing	3	\$12.72 - \$36.05	\$0.00
Retail	11	\$24.03 - \$45.19	\$0.00
Warehouse and Shipping	9	\$12.72 - \$16.96	\$0.00
Wholesale Sales & Support	4	\$22.83 - \$29.80	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

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 (Receivable/Payable/AG Credit/SOP)
	Business Operations
	Credit Analysis
	Customer Service
	General SOP
	Merchandising
	Process Improvement
	Visual Merchandiser
Commercial Skills (Standard)	Cutting & Bundle
	Denim Design
	Dip Resin/E-Flow Resin Procedures
	Dry Process
	Fabric Loader/Spreader SOP
	Fabric SOP
	Finishing SOP
	Grading
	Hand Sanding
	Inspection
	Laundry SOP
	Marker SOP
	Measurement SOP
	Pattern & Tech Design
	Press/Packing/Counter/Trim/Repair SOP
	Revit & Button SOP
	Sample Cutter SOP
	Thermal SOP
	Wash Design
	Wash Production
Computer Skills (Standard)	Active Directory Training
	Adobe Suite Software Training
	Apple TV Training
	Attendance on Demand Training
	Box.com
	CCTV Security Camera Training
	Demandware Software Training
	EDI Software
	Emedia
	Fedex Software

	Genius Device
	GXS Training
	Internal Proprietary Software
	Magic Software Training
	Microsoft Exchange Training
	Microsoft Office
	NuOrder Software
	OBIEE Software
	Paychex
	Retail Pro Software
	Shoretel Training
	Third Party Software Training
	Traffic Camera Training
	UPS Software
	YPLM Software
Continuous Improvement Skills	Best Practices
	Change Management
	Process Improvement
	Team Building
Manufacturing Skills (ME) (Standard)	Die Cutting Press
	Digital Printer
	Equipment Operation
	Folding Systems
	Inkjet Printer
	RF/Barcoding
	Scoring Systems
	Seal Laminator



TRAINING PROPOSAL FOR
Landscape Development, Inc.
17-0972

Panel Meeting Date: 10/27/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Mark Reeves
Type of Proposal: Single Employer
Funding Source: SET

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$ 167,400.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 167,400.00	N/A	\$ 0.00	\$ 410,000.00

APPLICANT PROFILE

Company Summary	Landscape Development, Inc. (LDI) is a landscaping and specialty contractor that has been serving the California construction industry since 1983.
------------------------	--

Industry Sector(s)	Construction
Priority Industry	Yes
No. Employees (Applicant)	State: 700 US: 700 World Wide: 700
Turnover Rate (Applicant)	9.40 %
Repeat Contractor	No
High Unemployment Area	Yes
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	LDI must provide training to employees on a new Enterprise Resource Planning (ERP) system with mobile applications and advanced field operating equipment.
------------------------------	--

Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	155	\$ 18.00	60	\$ 1080	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

LDI was founded in 1983 and is headquartered in Valencia. The Company provides landscape construction, design, maintenance, and environmental services to developers, homebuilders, general contractors, solar installers, homeowners associations, and estates. Through the years, LDI has grown into a recognized industry leader in sustainable landscape design, construction, and environmental protection.

2. Current Training Project Details

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

Purpose of Training	<p>The landscape construction and maintenance industries continue to require advancing technology in order to improve productivity in an environment that demands competitive pricing. Thus, LDI is preparing to implement a new ERP system and purchase advanced field operating equipment to increase productivity. With a projected go-live date of January 1, 2018, this new system will be installed on newly purchased mobile equipment such as tablets and smartphones. Training is scheduled to begin in November 2017 and will include job costing, material acceptance/usage, production reports and dispatch, and site preparation. The Company believes this new technology will improve processes and facilitate reinvestment in additional equipment, business expansion, and wage increases for existing workers.</p> <p>Training will take place at LDI locations in Valencia, Thousand Oaks, Corona, Bakersfield, Nipomo, and Clovis. Instruction will be provided by in-house subject matter experts and training vendors with technical expertise.</p>
Training Infrastructure and Administrative Plan	LDI's annual training budget is approximately \$200,000. The Company's Chief Financial Officer will oversee centralized project administration. LDI will also have lead personnel and Technology Champions at each facility to assist with training and documentation.
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 Computer Skills training on various features of LDI's new ERP system, as shown in Attachment 2.	

4. Additional Company or Training Project Details

N/A

4.1 Program Waivers

Waivers	Description
None have been requested	

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	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

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 1 - Group and Job Title Details

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

Group # 1: Retrainee			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
<i>Fresno County/HUA - 1080 Holland Ave, Clovis (ETP Required Wage: \$12.12)</i>			
Project Direct Staff	20	\$22.04 - \$40.00	\$0.00
<i>Kern County/HUA - 2202 Zeus Drive, Bakersfield (ETP Required Wage: \$12.12)</i>			
Project Management Staff	20	\$22.04 - \$40.00	\$0.00
<i>Kern County/HUA - 468 Poli Street, Unit 2E, Bakersfield (ETP Required Wage: \$12.12)</i>			
Project Direct Staff	30	\$22.04 - \$40.00	\$0.00
<i>Los Angeles County/SET - 28447 Witherspoon Pkwy, Valencia (ETP Required Wage: \$22.04)</i>			
Project Management Staff	41	\$22.04 - \$50.00	\$0.00
<i>Riverside County/SET - 1290 Carbide Drive, Corona (ETP Required Wage: \$22.04)</i>			
Project Management Staff	20	\$22.04 - \$50.00	\$0.00
<i>San Luis Obispo County/SET - 2290 Hutton Road, Nipomo (ETP Required Wage: \$22.04)</i>			
Project Direct Staff	14	\$22.04 - \$40.00	\$0.00
<i>Ventura County/SET - 1938 E. Thousand Oaks Boulevard, Thousand Oaks (ETP Required Wage: \$22.04)</i>			
Project Direct Staff	10	\$22.04 - \$40.00	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

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)	Foundation Advanced Training/ERP
	Foundation Basic Training/ERP
	Foundation Field Mobile Training/ERP
	Foundation Transactional Field Training/ERP



TRAINING PROPOSAL FOR
Momentous Insurance Brokerage Inc.
17-0797

Panel Meeting Date: 10/27/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Monique Webb
Type of Proposal: Single Employer
Funding Source: Out-of-State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$117,990.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$117,990.00 N/A		\$0.00	\$285,000.00

APPLICANT PROFILE

Company Summary	Momentous Insurance Brokerage Inc. (MIB) is an independent insurance brokerage company, offering all lines of insurance services in the commercial, entertainment, personal and sports areas.

Industry Sector(s)	Finance & Insurance		
Priority Industry	No		
No. Employees (Applicant)	State: 182	US: 214	World Wide: 214
Turnover Rate (Applicant)	7.00 %		
Repeat Contractor	Yes		

High Unemployment Area	No
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	This project will be a continuum of Computer Skills training to integrate all internal MIS processes.
------------------------------	---

Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	171	\$15.00	46	\$690	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

MIB was founded in 2008, and is headquartered in Van Nuys. The Company provides a high level of professional services to high income individuals, personalities and members of the entertainment industry, athletes and other related businesses.

2. Current Training Project Details

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

Purpose of Training	<p>The insurance industry continues to experience change and major overhaul due to the Affordable Care Act. Consequently, the Company continues to overhaul systems to comply with new insurance mandates, quoting systems and management software. To meet these changes, MIB recently purchased a new agency management system, EPIC. Trainees will continue to learn features of this program, as well as new updates incorporated since the initial purchase of the software program.</p> <p>To remain competitive, MIB must consistently provide better service at competitive rates. To accomplish this, the Company must have a better trained team to meet client requirements. Therefore, training on customer service will be delivered to highlight the importance of providing excellent service to increase customer satisfaction.</p> <p>MIS must also adapt to law changes, client expectations, and changes in industry. To remain competitive, MIB will provide training to Office Support Staff to respond better to clients. With quick responses to the client, staff is more likely to sell a service and maintain the relationship for returning customers. With greater knowledge available on the internet, the questions received from both prospects and clients is much more detailed. To answer these questions properly and promptly a considerable amount of training will also be delivered in Business.</p> <p>This is MIB's second ETP Agreement, and the second in the last five years. Training under the prior Agreement focused on the basics of EPIC software. In an effort to maintain business operations, Momentous was unable to train staff on the more complex features of the software. In this proposal, the Company will continue to implement and familiarize staff with EPIC software, as well as new and updated methodologies and insurance products/services. Continued training will allow the brokerage to provide better customer service and increase clientele. Training topics will also include communication, team building, mentoring, and other skills that will increase efficiency. Although some training topics from the previous project are included, no trainee will receive duplicate training. Training will be provided by in-house instructors.</p>
----------------------------	--

PROPOSED TRAINING PROJECT DETAILS

Training Infrastructure and Administrative Plan	The Human Resources Manager will oversee administration including collection of rosters and scheduling training. Training Refund Group will complete enrollments, perform data entries, and meet with ETP Staff.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
Account Executives, Account Managers, Account Specialist, Claims Staff, Office Services, Supervisors, and Sales Staff will receive Class/Lab training in Business and Computer Skills training (see Attachment 2).	

4. Additional Company or Training Project Details

N/A

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Training Refund Group	Anaheim \$	5,000.00
Administrative	Training Refund Group	Anaheim	13% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

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

PROPOSED TRAINING PROJECT DETAILS

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
ET16-0185 Van	Nuys	10/01/15-09/30/17	\$96,360 \$93,465		97%
Notes	Based on ETP Systems, 6,231 reimbursable hours have been tracked for a total of 165 trainees. Final payments will be submitted by October 30, 2017.				

4.4 Supporting Panel Proposal Documentation

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

Attachment 1 - Group and Job Title Details

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

Group # 1: Retrainee			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
<i>Los Angeles County - 5990 Sepulveda Blvd # 550, Van Nuys (ETP Required Wage: \$16.96)</i>			
Account Executives	60	\$19.00 - \$48.00	\$0.00
Account Managers	65	\$17.00 - \$46.00	\$0.00
Accounting Specialist	7	\$17.00 - \$46.00	\$0.00
Claims	6	\$17.00 - \$46.00	\$0.00
Office Services	12	\$17.00 - \$46.00	\$0.00
Salespeople	5	\$34.00 - \$63.00	\$0.00
Supervisor	16	\$40.00 - \$69.00	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	ACCOUNT STRATEGY AND KNOWLEDGE OR ACCOUNT ANALYSIS
	CASE STUDIES
	COACHING AND FEEDBACK
	COMMUNICATION
	DELEGATION and Time Management
	Improving Client Presentations
	Insurance Product Knowledge
	LEADING
	MENTORING
	MOTIVATION
	SALES SKILLS
	Speakers Forum
	SWOT - STRENGTHS, WEAKNESSES, OPPORTUNITY, AND THREATS
	Team Leadership
Computer Skills (Standard)	Adding Accounts
	Adding Attachments
	Epic Agency Management Software
	Servicing Accounts
	Transactions Accounts



Training Proposal for: Napa Valley College

Agreement Number: ET18-0135

Panel Meeting of: October 27, 2017

ETP Regional Office: Sacramento

Analyst: J. Lazarewicz

PROJECT PROFILE

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

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
\$39,616		\$2,724 8%		\$42,340

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

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 SET	Business Skills, Commercial Skills, Computer Skills	30	8-60	0	\$376	\$29.38
				Weighted Avg: 16			
2	Retrainee Priority Rate SB<100 SET	Business Skills, Commercial Skills, Computer Skills	3	8-60	0	\$444	\$22.04
				Weighted Avg: 16			
3	Retrainee Priority Rate SB<100	Business Skills, Computer Skills, Manufacturing Skills	2	8-60	0	\$444	\$16.16
				Weighted Avg: 16			
4	Entrepreneurial SB<100 SET	Business Skills, Commercial Skills, Computer Skills	22	8-60	0	\$1,129	N/A
				Weighted Avg: 48			
5	Entrepreneurial SB<100 Priority SET	Business Skills, Commercial Skills, Computer Skills	3	8-60	0	\$1,334	N/A
				Weighted Avg: 48			

Minimum Wage by County:**Job Number 1:** The State Average Hourly Wage of \$29.38 per hour**Job Number 2:** The SET Priority Industry Hourly Wage of \$22.04 per hour**Job Number 3:** \$16.16 per hour in Napa and Sonoma Counties**Job Number 4-5 (SET/Entrepreneurial):** No wage requirement**Health Benefits:** ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.**Used to meet the Post-Retention Wage?:** ☐ Yes ☐ No ☒ Maybe

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Manufacturing Staff	\$16.16 - \$30.00	2
Quality Control	\$25.40 - \$46.96	10
Research Staff	\$25.40 - \$46.96	5
Service Staff	\$21.00 - \$30.00	13
Technologist	\$34.78 - \$52.02	5
Owner	N/A	25

INTRODUCTION

The Napa Valley College (Napa Valley) (www.napavalley.edu) Economic and Workforce Development Department was established in 1992 to provide specialized occupational and professional development training to small businesses throughout the Napa and Sonoma County region. The goal of Napa Valley is to create economic impact for local and regional communities and businesses. To accomplish this mission, Napa Valley provides services including one-on-one business consulting, business training workshops, information dissemination, and referrals to partnering agencies. Napa Valley is accredited by the Accrediting Commission for Community and Junior Colleges and Western Association of Schools and Colleges.

This will be Napa Valley's third ETP-funded project and second in the past five years.

Need for Training

Napa Valley relies on annual surveys and comprehensive training needs assessments with each participating employer to identify critical needs and to ensure the training plans developed are in line with employers' strategic plans and goals. Many local employers expressed an increased need for entrepreneur small business management skills and food safety training programs to help make the business more sustainable, profitable, and stable.

To meet the needs of small business owners, entrepreneur business training (Nxlevel) was designed to increase trainee knowledge in operational effectiveness and competitive positioning within the industry. Training includes courses in setting goals and objectives for sustainable growth, business planning, market research for growth opportunities, financial statements, customer service, sales, and relationship management. Trainees represent a broad spectrum of industries such as wineries, hotels, printing, transportation, marketing, entertainment, specialty food, and sustainable agriculture.

Additionally, to assist small businesses in food service and food manufacturing industries, a comprehensive food safety training program was developed to ensure trainees are qualified to produce and distribute safe, quality food for consumers. Napa Valley's food safety training plan includes courses in Hazard Analysis and Critical Control Points, Safe Quality Food, and Good Agricultural Practices. Training will assure the preparation and production of food products will meet strict compliance and health regulations.

PROJECT DETAILS

Training Plan

The proposed training will mainly target small business entrepreneurs; however, companies from the food service and food manufacturing industries may also participate. Training will be provided using the Class/Lab delivery method. A combination of in-house and external trainers may be used.

Business Skills (55%): Training will be delivered to all occupations to promote effective communication, gain a better understanding of the industry, and improve business functions. Training topics will include communication skills, financial analysis, sales strategies, and project management.

Commercial Skills (38%): Training will be delivered to all occupations as related to job function to increase efficiencies, reduce waste, and improve quality. Training topics will include Good Agricultural Practices, sanitization, and quality assurance.

Computer Skills (5%): Training will be delivered to Quality Control, Technologists, Research, and Service Staff to enhance skill sets in computer software and marketing services. Training topics will include Microsoft Office Suite (Intermediate/Advanced) and Social Media for Business.

Manufacturing Skills (2%): Training will be delivered to Manufacturing Staff to ensure staff can operate equipment safely and effectively. Training topics will include standard operating procedures, packaging, and safety fundamentals.

Special Employment Training/Small Business Entrepreneurial

Trainees in Job Number 1 are funded under Special Employment Training (SET). In this job number, the participating employers will not be required to demonstrate out-of-state competition. To qualify under SET, trainees must earn at least the statewide average hourly wage of \$29.38 per hour at the end of the retention period. Trainees employed in a priority industry may qualify for a SET wage modification of up to 25% below the statewide average hourly wage from \$29.38 per hour to \$22.04 per hour. Napa Valley requests the wage modification for 3 trainees in Job Number 2.

Trainees in Job Numbers 4 and 5 are funded under SET. In these job numbers, the participating employers will not be required to demonstrate out-of-state competition and are not subject to a post-retention wage requirement as all trainees will be considered Entrepreneurs.

Commitment to Training

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

Many of the participating employers lack the resources to develop comprehensive training plans or provide structured training. Current training topics provided by most participating employers include new hire orientation, sexual harassment prevention, best practices, first-aid, and legal compliances.

Trainer Qualifications

Training for the proposed curriculum will be delivered by subject matter experts from the Napa Valley Economic and Workforce Development Department. Some training may also be provided by outside vendors with expertise in specific subject areas.

Training Coordinator

Napa Valley has a full-time program assistant and designated Economic and Workforce Development staff dedicated to coordinating all training efforts, including scheduling training, providing trainee enrollment data, roster collection, verifying training and retention completion, participating in ETP monitoring activities and ensuring compliance with all ETP requirements. Napa Valley also has instructors assisting with roster collection. Napa Valley will utilize ETP training rosters to document training and submit all information on to the ETP tracking system in a timely manner.

Impact/Outcome

Napa Valley will provide participants that complete NxLevel training a certificate of completion, valued by lending institutions as a technical assistance accomplishment. Food Safety training participants will receive an industry recognized certification upon completion.

Marketing and Support Costs

Napa Valley staff post training offerings on multiple websites including the Napa/Sonoma Small Business Development Center (SBDC) website. To garner interest, email is utilized to reach a total of 2,000 contacts within the SBDC database. Potential participants are also informed by word-of-mouth referrals from former trainees; local chambers of commerce; social media; Workforce Investment Boards; and economic development departments.

Napa Valley requests, and staff supports, 8% support costs to assist with recruitment, employer outreach, needs assessments, development of training curriculums, and obtaining specialized trainers.

Tuition Reimbursement

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

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET14-0316	Napa, Solano, and Sonoma	3/3/2014 – 3/2/2016	\$6,666	\$4,915 (74%)

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

Superior Food Safety of Napa will provide Commercial Skills training for a fee of approximately \$3,600.

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

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

8-60

Trainees may receive any of the following:

BUSINESS SKILLS**NxLevel Entrepreneurial Program**

- Alternative financing sources
- Assessing the competitive landscape for green business
- Avoiding the pitfalls of unmanaged growth
- Balancing the Four P's (Price, Product, Promotion, and Place)
- Budgeting for growth
- Building a global brand
- Building, motivating and managing teams
- Business planning and feasibility studies
- Calculating the break-even point for your growth opportunity
- Choosing the right promotional tools for your growing business
- Communicating your financial needs to lenders and investors
- Completing your NxLevel Business Plan
- Debt and equity financing for growth opportunities
- Developing a Projected Balance Sheet and comparing it with the Beginning Balance Sheet
- Energy efficiency and pollution prevention strategies
- Examining bookkeeping and recordkeeping activities and controls
- Feasibility and benefits of greening your business
- Financial statements and their uses
- Green branding and marketing techniques
- Green growth opportunities
- Growing your supply chain
- How accounting systems guide growth
- How budgets provide performance feedback
- How your business structure affects your growth options
- Identifying new markets and competitors
- Internal controls for cash management
- Legal issues that affect growing businesses
- Maintaining excellent customer service during business growth
- Managerial uses of financial statements
- Managing the risks of growth
- Managing your cash flow cycle
- Market research for growth opportunities
- Monthly and annual cash flow projections
- Negotiating and managing deals and contracts
- Online marketing, sales and relationship management
- Outsourcing and growth
- Preparing a financing proposal
- Preparing a Personal Financial Statement and current Business Balance Sheet
- Preparing the Monthly Projected Income Statement and understanding how it differs from the Cash Flow Projection

- Profitable growth and the entrepreneurial mindset
- Project management, financial management and other tools for managed growth
- Reviewing and adjusting budgets
- Setting goals and objectives for sustainable growth
- Setting the right price in new markets
- The impact of marketing on profitability
- The importance of networking
- The internal and external uses of a business plan
- The need for market analysis
- The NxLevel Business Plan: your roadmap for growth
- Understanding the Statement of Owner's Equity and Annual Statement of Cash Flows
- Using customer and competition profiles to analyze new market potential
- Using ratios to analyze Balance Sheet information

COMMERCIAL SKILLS

Hazard Analysis and Critical Control Points (HACCP)

- Food regulations pertaining to special process and HACCP plans
- HACCP decision tree
- HACCP logs
- Pathogens for Common Foods
- Policies/requirements
- Reduced oxygen packaging using the cook-chill method
- Reduced oxygen packaging with two barriers
- Sample HACCP plan
- Standard Operating Procedures
- Waiver requirements and request forms

Safe Quality Food (SQF)

- Certification process
- Food Safety fundamentals
- Overview
- Systems elements

Good Agricultural Practices (GAP)

- Developing effective GAP training
- Food laws and regulations
- Importance of GAP
- Pesticides
- Quality Assurance

Food Safety

- Cleaning and Sanitization
- Contamination

- Food allergens
- Foodborne Illnesses
- Forms of contamination
- Handling
- Introduction to food safety
- Management Systems
- Monitoring time and temperature
- Pest Management
- Preparation (cooking, cooling, reheating)
- Providing safe food
- Purchasing and receiving
- Service
- Storage

COMPUTER SKILLS

- Microsoft Office Suite (Intermediate/Advanced)
- Social Media for Business

MANUFACTURING SKILLS

- Importance of Good Manufacturing Practices (GMP)
- Packaging
- Safety Fundamentals
- Standard Operating Procedures

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

Note: Reimbursement for retraining is capped at 60 total training hours per trainee.
--

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Napa Valley College

CCG No.: ET18-0135

Reference No: 17-0215

Page 1 of 18

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: 4 Kids Sake

Address: 2416 Creekside Dr.

City, State, Zip: Napa, CA 94558

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

Company: A Flying Camera

Address: 3624 Airway Dr.

City, State, Zip: Santa Rosa, CA 95403

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

Company: A Little Romance

Address: 6525 Washington St.

City, State, Zip: Yountville, CA 94599

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

Company: Ace Cleaners

Address: 6404 Commerce Blvd.

City, State, Zip: Rohnert Park, CA 94928

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 3

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

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Napa Valley College

CCG No.: ET18-0135

Reference No: 17-0215

Page 2 of 18

Company: Alchemy Yarns

Address: 3800 Twig Ave.

City, State, Zip: Sebastopol, CA 95472

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 5

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

Company: All About Ability

Address: 1232 Eagleton St.

City, State, Zip: Napa, CA 94559

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 4

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

Company: Almost Home Doggy Care

Address: 4925 Gravenstein Hwy. North

City, State, Zip: Sebastopol, CA 95472

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

Company: Art and Clarity

Address: 1225 Division St.

City, State, Zip: Napa, CA 94559

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Napa Valley College

CCG No.: ET18-0135

Reference No: 17-0215

Page 3 of 18

Company: Ashton Vineyards

Address: 12000 Henno Road

City, State, Zip: Glen Ellen, CA 95442

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

Company: Azmera

Address: 384 Coombs St.

City, State, Zip: Napa, CA 94559

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 3

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

Company: Azure Cafe

Address: 1104 Garfield Dr.

City, State, Zip: Petaluma, CA 94954

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 5

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

Company: Beacon Home Care

Address: 555 Fifth St., Ste. 300L

City, State, Zip: Santa Rosa, CA 95401

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Napa Valley College

CCG No.: ET18-0135

Reference No: 17-0215

Page 4 of 18

Company: Benefit Biscuits LLC

Address: 2445 Flagstone Dr.

City, State, Zip: Napa, CA 94558

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

Company: Bohemian Farmer's Collective

Address: 12778 Dupont Road

City, State, Zip: Sebastopol, CA 95472

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

Company: Calistoga Kitchen

Address: 5150 Petrified Forest Road

City, State, Zip: Calistoga, CA 94515

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 5

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

Company: Carson Manufacturing

Address: 711 Portal St.

City, State, Zip: Cotati, CA 94931

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 7

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

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Napa Valley College

CCG No.: ET18-0135

Reference No: 17-0215

Page 5 of 18

Company: Casa Del Mar LLC

Address: 3660 Stony Point Road

City, State, Zip: Santa Rosa, CA 95407

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 6

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

Company: Coastal Viticultural Consultants

Address: 1575 Deer Park Road

City, State, Zip: Angwin, CA 94508

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 4

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

Company: Coddington Veterinary

Address: 2210 County Center Dr.

City, State, Zip: Santa Rosa, CA 95403

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 4

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

Company: CSI Paint

Address: 257 Walnut St.

City, State, Zip: Napa, CA 94559

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 7

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

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Napa Valley College

CCG No.: ET18-0135

Reference No: 17-0215

Page 6 of 18

Company: Earth and Sky Confections

Address: 2883 Foothill Blvd.

City, State, Zip: Calistoga, CA 94515

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

Company: Echelon Cycle and Multi Sport

Address: 125 5th St.

City, State, Zip: Santa Rosa, CA 95401

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 3

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

Company: Eco Plumbing

Address: 12 Columbine St.

City, State, Zip: Napa, CA 94558

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

Company: Elite Financial Company

Address: 1612 Jefferson St.

City, State, Zip: Napa, CA 94559

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 3

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

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Napa Valley College

CCG No.: ET18-0135

Reference No: 17-0215

Page 7 of 18

Company: Fine Tree Care

Address: 321 S. Main St.

City, State, Zip: Sebastopol, CA 95472

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 8

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

Company: Flats Napa Valley

Address: 1219 Main St.

City, State, Zip: St. Helena, CA 94574

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

Company: Food From Love

Address: 1638 Madrona Lane

City, State, Zip: St. Helena, CA 94574

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

Company: Fusion Technology Solutions

Address: 117A W. North St.

City, State, Zip: Healdsburg, CA 95448

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 7

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

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Napa Valley College

CCG No.: ET18-0135

Reference No: 17-0215

Page 8 of 18

Company: GI Joe's Outdoor Store

Address: 456 Kikki Dr.

City, State, Zip: Santa Rosa, CA 95401

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 3

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

Company: Giboin Cognac

Address: 1704 Dean York Lane

City, State, Zip: St. Helena, CA 94574

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 3

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

Company: GigAmarco

Address: 455 Technology Way

City, State, Zip: Napa, CA 94558

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 3

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

Company: Ginochio's Kitchen

Address: 360 Terra Verde Road

City, State, Zip: Bodega Bay, CA 94923

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Napa Valley College

CCG No.: ET18-0135

Reference No: 17-0215

Page 9 of 18

Company: Giusti Ranch and Vineyards

Address: 7750 Giusti Road

City, State, Zip: Forestville, CA 95436

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 9

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

Company: Gonzalez Vineyard Management

Address: 48 Glenwood Dr.

City, State, Zip: Napa, CA 94559

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

Company: Greater Green Construction

Address: 990 Central Ave.

City, State, Zip: Napa, CA 94559

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

Company: Gresco Marketing

Address: 1944 Brown St.

City, State, Zip: Napa, CA 94559

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Napa Valley College

CCG No.: ET18-0135

Reference No: 17-0215

Page 10 of 18

Company: Hect Cinemas

Address: 530 Venezia Way

City, State, Zip: Cloverdale, CA 95425

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

Company: Incredible Accessible

Address: 324 Second St. East

City, State, Zip: Sonoma, CA 95476

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 3

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

Company: Kai Consulting

Address: 818 Cherry St.

City, State, Zip: Santa Rosa, CA 95404

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

Company: Keep Solutions

Address: 2409 Canin Court

City, State, Zip: Santa Rosa, CA 95405

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Napa Valley College

CCG No.: ET18-0135

Reference No: 17-0215

Page 11 of 18

Company: LKBL & Associates

Address: 1721 Main St.

City, State, Zip: Napa, CA 94559

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 5

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

Company: Lucy's Salon

Address: 116 Encinas Lane

City, State, Zip: Sonoma, CA 95476

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

Company: Monday Bakery

Address: 106 Kerns Court

City, State, Zip: Napa, CA 94558

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

Company: Pauline's Automotive

Address: 200 S. High St.

City, State, Zip: Sebastopol, CA 95472

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 4

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

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Napa Valley College

CCG No.: ET18-0135

Reference No: 17-0215

Page 12 of 18

Company: R & C Automotive

Address: 1756 Tallic St.

City, State, Zip: Napa, CA 94558

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 5

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

Company: Real Food Enterprises

Address: 6811 Laguna Park Way

City, State, Zip: Sebastopol, CA 95472

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 4

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

Company: Renew Beauty Salon

Address: 3212 Jefferson St.

City, State, Zip: Napa, CA 94558

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

Company: Rent Napa Valley

Address: 150 Camino Vista

City, State, Zip: St. Helena, CA 94574

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 3

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

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Napa Valley College

CCG No.: ET18-0135

Reference No: 17-0215

Page 13 of 18

Company: Rio Café Take 2

Address: 20396 Bohemian Hwy.

City, State, Zip: Monte Rio, CA 95462

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 4

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

Company: Rodriguez and Son Trucking

Address: 10 Wild Rye Way

City, State, Zip: Napa, CA 94558

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

Company: Sarah's Silks

Address: 8591 Trenton Road

City, State, Zip: Forestville, CA 95436

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

Company: Shellac.net Wood Finish Supply

Address: 342 Minahen St.

City, State, Zip: Napa, CA 94559

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 3

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

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Napa Valley College

CCG No.: ET18-0135

Reference No: 17-0215

Page 14 of 18

Company: Spicey Vines Winery

Address: 347-G Healdsburg Ave.

City, State, Zip: Healdsburg, CA 95448

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 4

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

Company: Sungo Beverages

Address: 2032 Twin Court

City, State, Zip: Santa Rosa, CA 95405

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

Company: Superior Building

Address: 5 Payran St.

City, State, Zip: Petaluma, CA 94952

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

Company: Tender Care Services

Address: 4225 Solano Ave.

City, State, Zip: Napa, CA 94558

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 3

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

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Napa Valley College

CCG No.: ET18-0135

Reference No: 17-0215

Page 15 of 18

Company: The Burr Eatery

Address: 2770 Pine St.

City, State, Zip: Napa, CA 94558

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

Company: The Nectary

Address: 6760 McKinley Ave., Ste. 130

City, State, Zip: Sebastopol, CA 95472

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

Company: The Parlor for Hair Design

Address: 1701 Lincoln Ave.

City, State, Zip: Napa, CA 94558

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 3

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

Company: The Ranch at Lake Sonoma

Address: 100 Marina Dr. Lot A

City, State, Zip: Geyserville, CA 95441

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Napa Valley College

CCG No.: ET18-0135

Reference No: 17-0215

Page 16 of 18

Company: Tru-Cutt Manufacturing LLC

Address: 1027 Summit Ave.

City, State, Zip: Napa, CA 94559

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 5

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

Company: Turquoise Import LLC

Address: 1370 Trancas St. #302

City, State, Zip: Napa, CA 94558

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

Company: Ullia's Delicatessen

Address: 130 Stony Point Road

City, State, Zip: Santa Rosa, CA 95401

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 8

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

Company: Untapped Media

Address: 2211 Tejas Ave.

City, State, Zip: Napa, CA 94559

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 3

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

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Napa Valley College

CCG No.: ET18-0135

Reference No: 17-0215

Page 17 of 18

Company: V Industries

Address: 421 Walnut St., Ste. 180

City, State, Zip: Napa, CA 94559

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 3

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

Company: Valley Tech Solutions LLC

Address: 3371 Old California Way

City, State, Zip: Napa, CA 94558

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 4

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

Company: Vineyard Tales

Address: 661 Main St.

City, State, Zip: St. Helena, CA 94574

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

Company: Vintage Truck

Address: 1210 Main St.

City, State, Zip: St. Helena, CA 94574

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Napa Valley College

CCG No.: ET18-0135

Reference No: 17-0215

Page 18 of 18

Company: Vizlay Vineyards

Address: 929 Limerick Lane

City, State, Zip: Healdsburg, CA 95448

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

Company: Windsor Fabrication

Address: 5900 Pruitt Ave., Unit 290

City, State, Zip: Windsor, CA 95492

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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

Company: Yay Paella Catering

Address: 1007 W. College Ave. #128

City, State, Zip: Santa Rosa, CA 95401

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2

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



Training Proposal for:
Northern California Shop Ironworkers Local 790
Apprenticeship and Training Trust Fund

Agreement Number: ET18-0918

Panel Meeting of: October 27, 2017

ETP Regional Office: San Francisco Bay Area

Analyst: D. Woodside

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate Apprenticeship	Industry Sector:	Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Northern California Counties	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No International Association of Bridge, Structural and Ornamental Ironworkers Local 790		
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		N/A	

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
\$47,424		\$3,296 8%		\$50,720

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

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Apprentice Retrainee	Commercial Skills	32	8-200	0	\$1,585	\$19.46*
				Weighted Avg: 114			

Minimum Wage by County: \$22.04 per hour Statewide (Priority Industry)

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

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

Up to \$5.09 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation

Occupation Titles	Wage Range	Estimated # of Trainees
Apprentice Shop Ironworker	\$14.37 - \$20.65**	32

* 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.

**This wage range is for Apprentices in Years 2-4. The hourly wages and health benefits are based on the current Collective Bargaining Agreements. ETP will accept a union-negotiated wage, as a matter of policy even if it is below the standard which is \$22.04 per hour for Apprentices.

INTRODUCTION

In the 1940's, the Northern California Shop Ironworkers Joint Apprenticeship Committee, operating through Local 790 Apprenticeship and Training Trust Fund (NoCal Shop Ironworkers Trust) was established by collective bargaining between the Western Steel Council (representing employers) and the Shop Ironworkers Local 790 (labor). The Trust provides Apprentice and Journeyman training to persons engaged in the manufacture or fabrication of iron, steel, metal and other products, including pre-cast and pre-stressed concrete products.

Shop Ironworkers fabricate the individual steel components that form the structural steel framework for buildings and bridges. Other areas of metal fabrication include building metal stairs, handrails and various ornamental metal products using steel, aluminum, copper and brass, which are manufactured by the shop ironworker mechanic. Shop Ironworkers work in a manufacturing setting, as distinct from Field Ironworkers, who erect fabricated iron at job sites. This is a non-traditional Apprenticeship program, distinct from the Building Trades.

The Trust serves 200 Journeymen and 32 Apprentices. Shop Ironworkers work primarily in the San Francisco Bay Area; however, the Trust has jurisdiction over 46 Northern California counties. Apprenticeship training will take place in Benicia and Hayward. This proposal funds Apprenticeship training only.

This is the second ETP Agreement between ETP and NoCal Shop Ironworkers Trust. Continued high demand for training is driving this new request.

Employer Demand

Shop Ironworker Apprentices are currently fabricating products for a variety of construction projects in the Bay Area, including the Apple campus, San Francisco Airport Terminals, Stanford Hospital, Sales Force Tower, 181 Fremont, Chase Center Warriors Stadium, TransBay Terminal, Facebook, and other construction projects across the Bay Area.

Employers continue to report the need for highly skilled Shop Ironworkers to compete for work against foreign and domestic competition. This project will help signatory employers meet this goal by providing workers with the specific skills to systematically read blueprints, lay out jobs, and fabricate steel systems and components in an efficient and cost-effective manner. It should also be noted that sixteen out of seventeen signatory employers are small businesses employing 100 or fewer workers. These companies depend on the Trust to provide a customized 4-year classroom/laboratory training program to their Apprentices. ETP funding will also assist the Trust provide higher quality training with up-to-date equipment and training materials.

Apprenticeship Pilot

The Panel is authorized to fund Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by DAS. ETP funding is designed to supplement the cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. Depending on the type of trade, apprenticeship programs vary in length. In this case, the program is four years.

For the building trades, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship Pilot reimbursement is reduced by \$5.00, reducing the priority industry rate from \$18.00 to \$13.00 per hour. ETP funding will only apply to apprentices in Year 2 forward, to ensure commitment.

Typically, the ETP wage for Apprentices is no less than \$22.04 per hour, tracking the Special Employment Training wage as modified for priority industries. However, in this case, the actual wages paid are shown in the Training Plan Table and contract to reflect the wage system outlined in the collective bargaining agreement.

PROJECT DETAILS

All training is center-based and trainers are qualified Journeymen with extensive practical and training experience. ETP will fund Commercial Skills training under this proposal.

Commercial Skills (100%)

Training will help Apprentices gain the skills needed to work safely and productively in the trade. They will learn blueprint reading, math, welding, layout and fabrication skills enabling them to work as a productive member of a fabrication team.

Curriculum Development

Employer needs are communicated to the Trust through contractors represented by the Joint Apprenticeship Committee (JAC). Trainees provide feedback through their union representatives

on the JAC on their success in using skills learned in training to obtain work. Curriculum is developed by the fabrication industry with national and local input. The JAC continuously reviews and updates the curriculum, training materials, and training facilities based upon the industry expertise of the membership.

Impact/Outcome

Apprentices trained under this proposal will be certified as journeymen once they complete the entire apprentice curriculum.

Commitment to Training

The signatory employers will continue to pay into the Trust for Apprentice training. In addition, employers must provide structured, on-the-job training for Apprentices in accordance with DAS standards. Safety training is provided by the participating employers in accordance with all requirements under state and federal law.

➤ Training Infrastructure

This project will be overseen by the Apprenticeship Coordinator. NoCal Shop Ironworkers Trust employs two administrative staff who are available to assist in collecting and verifying ETP rosters. Steve Duscha Advisories will provide administrative services for the project and will input enrollment, tracking, and employer certification data into the ETP online systems.

Marketing and Support Costs

NoCal Shop Ironworkers Trust is requesting 8% in support costs to fund recruitment and conduct ongoing assessments of employer-specific job requirements. Two staff will work part time to assist with marketing, recruitment, needs assessments and schedule training. Although many of the participating employers have already been recruited, additional recruitment will take place to complete the project and replace any employers whose training needs change since the project planning process began. Assessment of employer-specific job requirements will all take place during the term of the contract. Staff recommends the 8% in support costs.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECT

The following table summarizes performance by NorCal Ironworkers JAC under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0903	\$50,720	08/27/2016-08/26/2018	32	28	0

The ETP On-Line Tracking System indicates that there are 2,775 reimbursable hours uploaded as of September 7, 2017 (potential earnings of over 76%). Additional training will be completed in September and October 2017, leaving sufficient time for retention. The Contractor expects to earn 100% of the Agreement amount upon completion of retention.

DEVELOPMENT SERVICES

Steve Duscha Advisories in Sacramento assisted with development for a flat fee of \$2,000.

ADMINISTRATIVE SERVICES

Steve Duscha Advisories will also perform administration services for an amount not to exceed 12.2% of payment earned.

TRAINING VENDORS

N/A

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

8–200

Trainees may receive any of the following:

COMMERCIAL SKILLS**Year 2**

- ✚ Structural I: Layout and fitting of structural steel members roof and floor: beam, tubing and pipe column.
- ✚ Workplace safety and power machinery operation: Understanding the relationship between a safe work environment, steel fabrication procedures and operation of power machinery used in a steel fabrication shop.
- ✚ Labor Studies I
- ✚ Structural II: Procedure for layout and fitting of structural steel members including trusses, left hand beams and column, usage of transit for shop layout application and fastening procedures (bolts) used in shop assembly of structural steel.

Year 3

- ✚ Structural III—Methods and procedures for the development and layout of templates and patterns used in structural steel fabrication.
- ✚ Welding: Code of Standard Practice for Steel buildings. Application of codes and standards requirements in the quality control of fabrication, welding and inspection of fabricated structural steel products.
- ✚ Metal stair layout and fabrication: The principles and procedure relating to layout and fabrication of metal stairs.

Year 4

- ✚ Metal railing—layout and fitting.
- ✚ Ornamental metal fabrication: Procedures and processes used in the fabrication of architectural exposed non-ferrous metal products.
- ✚ Press brake operation and safety.
- ✚ Blueprint reading II—principles of reading and interpreting structural steel engineering design blueprints used to build steel frame buildings.

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



TRAINING PROPOSAL FOR
Pyramid San Francisco Management L.P.
17-0856

Panel Meeting Date: 10/27/2017
Regional Office: San Francisco Bay Area Regional Office
Analyst Name: Samantha Wang
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$130,800.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$130,800.00 N/A		\$0.00	\$123,000.00

APPLICANT PROFILE

Company Summary	Pyramid San Francisco Management dba Sheraton Fishermans Wharf (Pyramid SF), is a hotel resort that serves business travelers and tourists from across the globe.
------------------------	---

Industry Sector(s)	Services (Other)		
Priority Industry	No		
No. Employees (Applicant)	State: 1,020	US: 9,200	World Wide: 10,460
Turnover Rate (Applicant)	5.50 %		
Repeat Contractor	No		
High Unemployment Area	No		

Union(s)	Unite Here Local 2; Teamsters Local Union No. 856; Stationary Engineers Local Union No. 39
-----------------	--

TRAINING PROFILE

Training Objective(s)	To accomodate with the new hotel renovation, Pyramid SF will train its employees in job skills to meet customer expectations.
------------------------------	---

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	218	\$15.00	40	\$600	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1975 and located in San Francisco, Pyramid SF is a hotel resort. The Hotel has 531 guest rooms, 11,300 sq. ft. meeting space, a buffet restaurant, 24 hour fitness center and other amenities.

The Hotel serves business travelers and tourists from across the globe. This is Pyramid SF's first ETP Agreement.

2. Current Training Project Details

PROPOSED TRAINING PROJECT DETAILS

Purpose of Training	<p>In the hotel industry, each hotel is Diamond Rated to convey the type of experience a customer can expect. To remain competitive, Pyramid SF must undergo renovations to transform its establishment from a 3-Diamond to a 4-Diamond rating. The rating difference comes from the interior state of the hotel and the level of service.</p> <p>The Hotel is planning to spend \$25-30 million to renovate the rooms, restaurant and conference rooms. Pyramid SF is also planning to spend an additional \$32,000 on new equipment and technology that will impact the kitchen and restaurant layout, room doors, front desk and workflow procedures. Due to these new changes, ETP-funded training will result in an overall skills' upgrade. For example, Continuous Improvement, Business and Management Skills training will be delivered in team building, communication and customer service to increase the trainees' ability to communicate as a team and work together more cooperatively.</p> <p>To improve the level of guest service, the Company plans to implement the following systems:</p> <ul style="list-style-type: none">• Point of Sale System - This training includes Sales Tracking and Reservation System. With a full service restaurant being installed, Food and Beverage staff will learn to efficiently serve customers.• Radio Frequency Identification Device Enabled Key Locks - This is a new door lock system operated by radio frequency and allows a quicker access into rooms in comparison to the magnetic strip cards. Room Servers and Front Desk staff will be trained on this new system to ensure they have the knowledge when assisting guests.• Private Brand Exchange System - This equipment is a private telephone network. All staff will learn to use this equipment to ensure they have the knowledge when there is an update to be able to transfer calls.
----------------------------	---

PROPOSED TRAINING PROJECT DETAILS

Training Infrastructure and Administrative Plan	ETP funds will not displace Pyramid SF's existing financial commitment to training. The Company spends \$79,000 annually on training, which includes: new hire orientation, job skills training, sexual harassment prevention, ergonomic safety training, CPR, and diversity training. Safety training is provided in accordance with all pertinent requirements under state and federal law. Class/Lab training will be delivered by qualified internal staff. The Contract Representative and Manager will oversee all training, and has retained National Training Company North to assist with administrative duties.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
Training include: Business, Computer, Continuous Improvement and Management Skills. Some of the training topics include: PBX Skills, Point of Sale Application, Critical Think Skills, and Conflict Resolution. This training ensures staff will learn all materials to better assist their customers.	

4. Additional Company or Training Project Details

Union Support

Unite Here Local 2, Stationary Engineers Local Union No. 39, and Teamsters Local Union No. 856, has submitted a letters of support for the proposed training.

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

Pyramid SF has retained the services of the following Subcontractor.

PROPOSED TRAINING PROJECT DETAILS

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	National Training Company North	Middletown \$	14,000.00
Administrative	National Training Company North	Middletown	13% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 1 - Group and Job Title Details

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

Group # 1: Retrainee			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
<i>San Francisco County - 2500 Mason St, San Francisco (ETP Required Wage: \$17.63)</i>			
Accounting	7	\$25.57 - \$29.57	\$0.00
Administration	4	\$22.87 - \$25.65	\$0.00
Engineer	10	\$25.75 - \$43.00	\$0.00
Food & Beverage	46	\$14.00 - \$28.89	\$3.63
Front Desk	42	\$23.93 - \$25.37	\$0.00
Housekeepers	84	\$14.00 - \$23.64	\$3.63
Managers	17	\$26.20 - \$34.70	\$0.00
Sales	8	\$26.53 - \$29.37	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Business Processes
	Communication & Interpersonal Skills
	Dealing With Difficult People
	Europay, Mastercards, Visa (EMV) System
	Guest Service Skills
	Hospitality & Communication Skills
	Identifying/Meeting Guest Needs
	Negotiating Skills
	Operating Procedures
	Private Brand Exchange (PBX) Skills
	Putting the Guest First
	Radio Frequency Identification Device (RFID) Skills
	Resolving Guest Complaints
	Service Values
Computer Skills (Standard)	Accounting Skills
	Computer Application Skills
	Customer Information Systems
	Internal Customer Applications
	MS Office (Intermediate and Advanced)
	Point of Sale Applications
	Procurement Software
	Reservation Systems
	Sales Reports & Scheduling Software
	Smartphone Technology and Application Skills
	Tablet Technology and Application Skills
Continuous Improvement Skills	Critical Thinking Skills
	Measuring for Success
	Problem Solving and Resolution
	Standard Work Procedures
	Team Building Skills
Management Skills	Accountability & Taking Responsibility
	Change Management
	Coaching and Mentoring
	Conflict Resolution
	Empowerment
	Hospitality & Communication Skills
	Motivation & Attitude Improvement
	Professionalism
	Relationship Building
	Supervisory Skills
	Teamwork



UNITE HERE!

August 10, 2017

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

FILE

Re: Sheraton Fisherman's Wharf Hotel Training Panel

UNITE HERE Local 2 supports the proposed Employment Training Panel (EPT) Sheraton Fisherman's Wharf Hotel project.

The Union understands that the EPT training program will provide various types of training to: Housekeeping, Bell, PBX, Food & Beverage, Culinary and Banquet staff.

Sincerely,

Anand Singh
President

opeiu-3-afl-cio(51)mds

Anand Singh
President

Chito Cuéllar
Vice-President

Tina Chen
Secretary-Treasurer

209 Golden Gate Ave., San Francisco, CA 94102 • phone: 415.864.8770 • fax: 415.864.4158
209 Highland Ave., Burlingame, CA, 94010 • phone: 650.344.6827 • fax: 650.344.9406





TEAMSTERS LOCAL UNION No. 856

453 SAN MATEO AVENUE • SAN BRUNO • CALIFORNIA 94066

TELEPHONE: (650) 635-0111 • FAX NUMBER (650) 635-1632 • 1(800) 758-TEAM (8326)

August 14, 2017

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

Re: Sheraton Fisherman's Wharf Hotel Training Panel

The Teamsters Local Union No. 856 supports the proposed Employment Training Panel (EPT) Sheraton Fisherman's Wharf Hotel project.

The Union understands that the EPT training program will provide various types of training to:
Reservations, Accounting, Front Desk and Sales.

Sincerely,

Mike Lagomarsino
President
Teamsters Local Union No. 856

ML/lh

FREIGHT CHECKERS, CLERICAL EMPLOYEES AND HELPERS
AFFILIATED WITH THE INTERNATIONAL BROTHERHOOD OF TEAMSTERS
SAN FRANCISCO BAY AREA, CALIFORNIA





Stationary Engineers, Local 39

INTERNATIONAL UNION OF OPERATING ENGINEERS AFL-CIO

JERRY KALMAR
BUSINESS MANAGER-SECRETARY

August 15, 2017

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

Re: Sheraton Fisherman's Wharf Hotel Training Panel – Ref:

The Stationary Engineers Local Union No. 39 supports the proposed Employment Training Panel (EPT) Sheraton Fisherman's Wharf Hotel project. <http://etp.ca.gov/>

The Union understands that the EPT training program will provide various types of training to: Journeymen, Apprentices, and Utility workers.

Sincerely,

A handwritten signature in black ink, appearing to read 'Jerry Kalmar', is written over a horizontal line.

LOCAL 39



TRAINING PROPOSAL FOR

Sensiba San Filippo, LLP

17-0707

Panel Meeting Date: 10/27/2017

Regional Office: San Francisco Bay Area Regional Office

Analyst Name: Luke Molinar

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: \$108,120.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$108,120.00 N/A		\$0.00	\$287,000.00

APPLICANT PROFILE

Company Summary	Sensiba San Filippo, LLP (Sensiba) is an accounting firm offering audit, consulting, tax planning and risk assurance services.
------------------------	--

Industry Sector(s)	Professional, Scientific and Technical		
Priority Industry	No		
No. Employees (Applicant)	State: 174	US: 174	World Wide: 174
Turnover Rate (Applicant)	2.00 %		
Repeat Contractor	No		
High Unemployment Area	Yes		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Sensiba will provide training on how to best advise clients on several major changes in the accounting industry. Training will include the Company's new Learning Management System (LMS), as well as business and computer skills training.
------------------------------	--

Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	136	\$15.00	53	\$795	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Fonded in 1975 and headquartered in Pleasanton, Sensiba (ssfilp.com/) offers services in the following areas: auditing, tax planning and compliance, estate and trust planning, employee benefit planning, and merger and acquisition. Sensiba's client base includes individuals, partnerships, and companies of all sizes with a specialty in manufacturing companies. Sensiba is as a member of the Manufacturing CPAs national affiliation, for CPA firms that specialize in serving manufacturers, and as a co-founder of the East Bay Manufacturing Group, an industry group for East Bay Area manufacturers and those who serve them.

Sensiba will have six locations participating in training; Pleasanton (Alameda County); Morgan Hill (Santa Clara County); San Jose (Santa Clara County); San Mateo (San Mateo County); San Francisco (San Francisco County); and Fresno (Fresno County).

This is Sensiba's first ETP Agreement.

2. Current Training Project Details

Purpose of Training	Sensiba's primary responsibility is to assist companies in understanding how they may be affected by changing legal requirements. Staff will be trained on changes to immigration, healthcare, tax and related laws.
Training Infrastructure and Administrative Plan	Sensiba's Director of Learning and Development will schedule and organize training, which will be delivered by internal subject matter experts and the vendors if needed. Each location has a training coordinator to track training and report to the Director of Learning and Development. Sensiba has also retained an administrative subcontractor to assist with the administration of this project.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

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	

PROPOSED TRAINING PROJECT DETAILS

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
<p>Accountants will receive training on new audit rules, that affect partnerships of all types; and new revenue recognition rules that affect many companies, especially manufacturers. Accountants will also receive training on employee benefit and retirement plans, tax updates, and hiring practices.</p> <p>Training will include Client Services, Communication, Leadership and Presentation Skills. These courses will help employees better work to effectively communicate complex topics.</p> <p>Sensiba will also offer training on a wide range of accounting and auditing software, as pertinent to staff duties.</p> <p>The Company is aware that Continuing Education (CE) units to maintain a license are not subject to ETP reimbursement, and will only seek ETP's assistance for training above and beyond these CE hours.</p>	

Delivery Method/Level	E-Learning - Instructor Led/Distance Learning
Summary	
<p>Sensiba has employees in six offices throughout California. Each office has a training or conference room equipped with a teleconferencing system. The Company will deliver some training in Commercial Skills through the E-Learning Methodology, allowing employees from each office to easily participate. Sensiba is aware that employees must participate in E-Learning from the office, and that the 1:20 ratio applies to the participant total as a whole.</p>	

4. Additional Company or Training Project Details

N/A

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

Sensiba has retained the services of the following Subcontractor.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Training Refund Group	Anaheim \$	7,000.00
Administrative	Training Refund Group	Anaheim	13% of payment earned
Training	None selected to date	N/A	N/A

PROPOSED TRAINING PROJECT DETAILS

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 1 - Group and Job Title Details

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

Group # 1: Retrainee			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
Alameda County - 5960 Inglewood Drive suite 201, Pleasanton (ETP Required Wage: \$17.63)			
Accountant 1	11	\$19.00 - \$37.00	\$0.00
Accountant 2	7	\$35.00 - \$64.00	\$0.00
Accountant 3	6	\$60.00 - \$89.00	\$0.00
Support	20	\$18.00 - \$43.00	\$0.00
Fresno County/HUA - 6795 N PALM AVE SUITE 108, Fresno (ETP Required Wage: \$12.12)			
Accountant 1	9	\$18.00 - \$43.00	\$0.00
Accountant 2	1	\$35.00 - \$64.00	\$0.00
Accountant 3	2	\$60.00 - \$89.00	\$0.00
Support	3	\$18.00 - \$43.00	\$0.00
San Francisco County - 535 Mission Street, San Francisco (ETP Required Wage: \$17.63)			
Accountant 1	1	\$18.00 - \$43.00	\$0.00
Accountant 3	1	\$70.00 - \$91.00	\$0.00
Administrative	1	\$18.00 - \$43.00	\$0.00
San Mateo County - 2929 CAMPUS DR SUITE 225, San Mateo (ETP Required Wage: \$17.63)			
Accountant 1	12	\$18.00 - \$43.00	\$0.00
Accountant 2	2	\$35.00 - \$64.00	\$0.00
Accountant 3	4	\$60.00 - \$89.00	\$0.00
Administration	4	\$18.00 - \$43.00	\$0.00
Santa Clara County - 181 METRO DR SUITE 400, San Jose (ETP Required Wage: \$17.63)			
Accountant 1	27	\$18.00 - \$43.00	\$0.00
Accountant 2	5	\$35.00 - \$64.00	\$0.00
Accountant 3	8	\$60.00 - \$89.00	\$0.00
Administrative	4	\$18.00 - \$43.00	\$0.00
Santa Clara County - 18625 SUTTER BLVD SUITE 600, Morgan Hill (ETP Required Wage: \$17.63)			
Accountant 1	3	\$18.00 - \$43.00	\$0.00
Accountant 3	2	\$70.00 - \$91.00	\$0.00
Administrative	3	\$18.00 - \$43.00	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

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 Writing
	Client Services
	Communication
	Leadership
	Networking
	Presentation Skills
	Problem Resolution
	Project Management
	Team Building
Commercial Skills (Standard)	Audit Watch
	Auditing and Accounting
	Best Practices
	Employee Benefit Plans
	Employee Retirement and Income Act
	Estate and Trusts
	Fraud
	Regulatory Changes
	Tax Compliance
	Tax Updates
	Tax Watch
	Technical Updates
Computer Skills (Standard)	Accounting Research Manager
	Adobe
	Analytic Software
	Auditing Software
	Case Tracking Software
	CheckPoint Tax Research
	Fixed Asset Software
	Learning Management System
	Microsoft Office Intermediate
	PROfx Tax Software
	Quickbooks
	Scheduling
	Tax Software
	Teleconferencing Services
<i>Delivery Method /Level</i>	<i>E-Learning – Instructor Led/Distance Learning</i>
Training Type (Level)	Planned Course Offerings
Commercial Skills (Standard)	Auditing and Accounting
	Best Practices
	Employee Benefit Plans
	Employee Retirement and Income Act
	Estates and Trusts
	Fraud
	Tax Compliance

Attachment 2 - Training Delivery and Curriculum Listing

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

Commercial Skills (Standard)	Tax Updates
	Tax Watch
	Technical Updates



TRAINING PROPOSAL FOR
TIGER LINES, LLC
17-0815

Panel Meeting Date: 10/27/2017
Regional Office: Sacramento Regional Office
Analyst Name: Cristina Kaiser
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$ 65,065.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 65,065.00	N/A	\$ 0.00	\$ 90,000.00

APPLICANT PROFILE

Company Summary	Tiger Lines, LLC (Tiger Lines) is a California based trucking company that specializes in hauling agricultural crop production from farm-to-processor. The Company also hauls forest byproducts such as lumber and rocks as well as recyclable/waste materials.

Industry Sector(s)	Transportation and Warehousing		
Priority Industry	No		
No. Employees (Applicant)	State: 180	US: 180	World Wide: 180
Turnover Rate (Applicant)	14.00 %		

Repeat Contractor	Yes
High Unemployment Area	Yes
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	To remain competitive and expand, Tiger Lines must train staff in all areas of its industry to meet and exceed customer expectations. Training will focus on areas that will improve process efficiencies and will lead to lowering the cost of their services.
------------------------------	---

Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	42	\$ 15.00	29	\$ 435	8 - 200
2	Retrainee/Seasonal Worker	25	\$ 15.00	29	\$ 435	8 - 200
3	Retrainee - Job Creation Initiative Program	38	\$ 20.00	38	\$ 760	8 - 200
4	Retrainee/Seasonal Worker/Veterans Program	10	\$ 22.00	28	\$ 616	8 - 200
5	Retrainee - Job Creation Initiative Program/Veterans Program	1	\$ 22.00	40	\$ 880	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 1981 and headquartered in Lodi, Tiger Lines, LLC seeks ETP funding for retraining. Throughout the years, Tiger Lines has become one of California's premier carriers able to haul virtually any product with its dedicated trucking fleet.

Approximately, 60% of its business is specialized for seasonal agricultural crop production such as grape and tomato harvesting and hauling forestry product. The remaining 40% of the business involves moving freight of all kinds and providing dedicated fleet services and logistics to companies. Tiger Lines hauls raw produce from grower to processor, cased goods from processor to distributor or consumer, and recyclables and waste from transfer stations to landfills. The Company also works directly with distribution centers to dedicate drivers and trucks to distribute goods to retail stores.

Tiger Lines has four facilities located in Lodi, Fresno, Modesto, and Woodland. All locations will participate in ETP training with Lodi acting as the lead facility.

2. Current Training Project Details

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

PROPOSED TRAINING PROJECT DETAILS

Purpose of Training	<p>Purpose of Training</p> <p>The competition for transport routes in the Central Valley remains very high. To keep up, Tiger Lines will train all staff to improve process efficiencies, which will lower costs and increase customer satisfaction. Lean process training for all occupations will allow Tiger Lines to increase competitiveness within the industry and procure additional contracts.</p> <p>Tiger Lines' training plan includes focuses in driver training to improve their equipment operation and driving skills. Mechanics training will reduce vehicle and trailer down-times and front office worker training will lead to an increase in sales, faster turn-around times and greater proficiencies with software and computer databases. In addition, all staff will receive training in soft skills to improve the quality of customer service and build lasting relationships for the company.</p> <p>Tiger Lines is also dedicated to cross-training staff. Cross-training will develop leaders within the Company and create a more well-rounded staff to increase business and provide greater opportunities to promote from within.</p> <p>Retrainee- Job Creation</p> <p>The ETP program provides incentives to companies that commit to hiring net new employees. In this proposal, Tiger Lines has committed to hiring 39 new employees as shown in Group Numbers 3 and 5. The Company's customer base is expanding from increased demand. This increased demand necessitates that Tiger Lines open new transportation routes in the Northern California area. Tiger Lines is also expanding its services from a primarily agricultural based transportation company to now include the logistical services for retail establishments.</p> <p>With the expansion in Northern California, Tiger Lines will be hiring 20 of their seasonal drivers on to full-time permanent positions by the end 2017. To be eligible for reimbursement, trainees must have been hired within the three-month period prior to Panel approval or during the term of the Agreement.</p>
----------------------------	--

PROPOSED TRAINING PROJECT DETAILS

Training Infrastructure and Administrative Plan	<p>Tiger Lines has designated two staff members who will be responsible for overseeing all administration duties and the implementation of training. Both staff members participating in the prior Agreement and are familiar with the ETP program.</p> <p>In addition, Tiger Lines has retained Sierra Consulting Services who will assist with all administrative duties associated with this Agreement.</p>
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations identified in Attachment 1 will receive training applicable to their jobs in Business, Commercial, Computer, Continuous Improvement, and Management Skills.	

Delivery Method/Level	E-Learning - Instructor Led/Distance Learning
Summary	
All occupations identified in Attachment 1 will receive E-Learning training applicable to their jobs in Business, Commercial, Computer, Continuous Improvement, and Management Skills.	

Delivery Method/Level	Productive Laboratory
Summary	
Eight Fleet Technicians will be provided with Productive Lab training in Commercial Skills to supplement Class/Lab training.	

4. Additional Company or Training Project Details

Productive Lab Training

Productive Laboratory (PL) trainees may produce goods for profit as part of the training in the courses identified under the Curriculum. Due to the nature of their services, certain training cannot be replicated in a class/lab environment. PL training drives the ability to learn, demonstrate and master experience in a working environment without creating an excess of waste.

PL Trainees will gain the ability to troubleshoot issues, maintain equipment and parts through

PROPOSED TRAINING PROJECT DETAILS

trainings such as Arc Welding, ASE (Automotive Service Excellence) Engine and Drive Train repair, ASE Tractor repair systems, ASE Trailer repair including brakes and suspension, Electrical/Electronic repair systems, and Standard Preventive Maintenance Inspection for tires. The Fleet Technicians require extensive PL training on the maintenance and repair of the entire truck and trailer.

The contractor has a training checklist of the competencies the trainees must meet which totals over 200 hours of PL training. Because of the in-depth skills and accuracy, the trainees must maintain, the company is asking for 90 hours of PL training for their Fleet Technician trainees. The following is a list of training topics and the estimated hours for each:

- Welding (20 hrs.)
- ASE Diesel Engine Repair (25 hrs.)
- ASE Tractor Body Repair (14 hrs.)
- ASE Trailer Repair (13 hrs.)
- ASE Basic Electrical Repair (13 hrs.)
- ASE Tire Repair (5 hrs.)

The Company will conduct all PL training with a 1:1 trainer-to-trainee ratio. PL training will supplement class/lab training to ensure production skills are mastered. Trainers will be subject matter experts and will be present 100% of the time during PL training.

4.1 Program Waivers

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

Waivers	Description
Retention Period for Veterans	Alternate Retention Period: 500 hours within 272 consecutive days, working full-time with one or more Employers Approval Justification: Tiger Lines has 11 current employees who are Veterans. The Veterans range from drivers to management. Tiger Lines prides itself in hiring Veterans and when looking to hire, they post job opportunities for Veterans to view and apply.
Retention Period for Seasonal Non-Union	Alternate Retention Period: 500 working hours within the 12 months following training with up to three employers in the crop production industry Approval Justification: Tiger Lines employs full time staff and during their peak seasons, employs seasonal workers in the office/admin, business, management, drivers and maintenance occupations. Majority of their business is during tomato and grape harvesting but they also transport for forestry and logging seasons as well. Tiger Lines plans to make 20 drivers full time by the end of the year and therefore,

PROPOSED TRAINING PROJECT DETAILS

Waivers	Description
	meets ETP requirements.
Increase Maximum Allowable PL Training Hours	<p>Increase the Maximum allowable PL training hours from 60 to 90 for Fleet Technicians.</p> <p>Approval Justification: Tiger Lines' training program for its mechanics is detailed and hands-on for real life experience. Productive Lab training offers the best opportunity for the trainees to be successful and be able to meet the requirements of the position.</p> <p>The skill level to learn welding, diesel engine repair, tractor body repair, trailer repair, basic electrical repair, and tire repair is very detail oriented. To learn these skills properly requires doing each technique on the actual equipment in a working environment. For each skill, the Company has a dedicated subject matter expert to ensure each Fleet Technician is able to properly repair and maintain all vehicle types and vehicle accessories including all types of day and long haul trailers. The trainer will follow American Public Transportation Association Guidelines which requires the trainee to perform the procedures on the actual equipment. Technician PL training is crucial to the success of the Company as all other occupations rely on the vehicles being able to safely deliver products from one location to another.</p> <p>With PL training, Technicians will be able to properly diagnose, repair, and maintain diesel engines, day-haul and long-haul trailers, tires for both the truck and trailer, HVAC systems, brakes, and suspension. The training plan includes an average of 20 hours for welding, 25 hours for diesel engine repair, 14 hours for tractor body repair, 13 hours for trailer repair, 13 hours for electrical repair, and 5 hours for tire repair.</p> <p>The 60 cap on PL hours is not sufficient for the trainees to become proficient in the 6 areas the Company has designated in this application as advancement for the Fleet Technicians, thus 90 hours of PL is being requested.</p>

PROPOSED TRAINING PROJECT DETAILS

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Sierra Consulting Service	Cameron Park	\$ 6,000.00
Administrative	Sierra Consulting Service	Cameron Park	N/A
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
ET15-0468	2	06/30/15 – 6/29/17	\$150,480	\$64,746	43%
Notes	<p>Tiger Lines' performance of 43% in their prior Agreement was in part caused by a change in program management resulting in no training being conducted in the first year. Subsequently, the Company made a change in the program manager, and in the final year of the contract Tiger Lines was able to begin implementing their training plan. The proposed training project has been right-sized consistent with prior earnings.</p> <p>Training in this proposal will be implemented by the same staff that was able to successfully lead the project in the final year of the prior contract. Tiger Lines is now experienced with the ETP program and its requirements and is ready to implement their training plan.</p>				

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 1 - Group and Job Title Details

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

Group # 1: Retrainee			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
San Joaquin County/HUA - 927 BLACK DIAMOND WAY, Lodi (ETP Required Wage: \$12.12)			
Clerical	1	\$12.00 - \$19.50	\$0.12
Dispatch	1	\$16.00 - \$30.00	\$0.00
Driver	25	\$12.50 - \$20.00	\$0.00
Fleet Technicians	4	\$10.50 - \$25.00	\$1.62
Manager	1	\$22.00 - \$45.00	\$0.00
Stanislaus County/HUA - 401 Flamingo Dr, Modesto (ETP Required Wage: \$12.12)			
Clerical	1	\$12.00 - \$20.00	\$0.12
Dispatch	1	\$20.00 - \$30.00	\$0.00
Driver	6	\$12.50 - \$20.00	\$0.00
Manager	1	\$20.00 - \$45.00	\$0.00
Yolo County/HUA - 1376 Lemen Ave, Woodland (ETP Required Wage: \$12.12)			
Driver	1	\$12.50 - \$20.00	\$0.00
Fleet Technicians	0	\$10.50 - \$25.00	\$1.62
Manager	0	\$20.00 - \$45.00	\$0.00

Group # 2: Retrainee/Seasonal Worker			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
San Joaquin County/HUA - 927 BLACK DIAMOND WAY, Lodi (ETP Required Wage: \$12.12)			
Clerical	1	\$12.00 - \$19.50	\$0.12
Dispatch	1	\$16.00 - \$30.00	\$0.00
Driver	13	\$12.50 - \$20.00	\$0.00
Fleet Technicians	1	\$10.50 - \$25.00	\$1.62
Manager	1	\$22.00 - \$45.00	\$0.00
Stanislaus County/HUA - 401 Flamingo Dr, Modesto (ETP Required Wage: \$12.12)			
Dispatch	1	\$20.00 - \$30.00	\$0.00
Driver	3	\$12.50 - \$20.00	\$0.00
Yolo County/HUA - 1376 Lemen Ave, Woodland (ETP Required Wage: \$12.12)			
Driver	1	\$12.50 - \$20.00	\$0.00
Fleet Technicians	2	\$10.50 - \$25.00	\$1.62
Manager	1	\$20.00 - \$45.00	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

Attachment 1 - Group and Job Title Details

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

Group # 3: Retrainee/Job Creation – Retrainee Initiative Program			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
<i>Fresno County/HUA - 1055 E. North Avenue, Fresno (ETP Required Wage: \$10.50)</i>			
Driver	8	\$14.50 - \$17.75	\$0.00
<i>San Joaquin County/HUA - 927 BLACK DIAMOND WAY, Lodi (ETP Required Wage: \$10.50)</i>			
Dispatch JC	2	\$15.00 - \$25.00	\$0.00
Driver JC	26	\$12.50 - \$20.00	\$0.00
Fleet Technicians JC	1	\$10.50 - \$25.00	\$0.00
Manager JC	1	\$18.00 - \$45.00	\$0.00

Group # 4: Retrainee/Seasonal Worker/Veterans Program			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
<i>San Joaquin County/HUA - 927 BLACK DIAMOND WAY, Lodi (ETP Required Wage: \$12.12)</i>			
Dispatch	2	\$16.00 - \$30.00	\$0.00
Driver	5	\$12.50 - \$20.00	\$0.00
Manager	1	\$22.00 - \$45.00	\$0.00
<i>Stanislaus County/HUA - 401 Flamingo Dr, Modesto (ETP Required Wage: \$12.12)</i>			
Driver	2	\$12.50 - \$20.00	\$0.00

Group # 5: Retrainee/Job Creation – Retrainee Initiative Program/Veterans Program			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
<i>Fresno County/HUA - 1055 E. North Avenue, Fresno (ETP Required Wage: \$10.50)</i>			
Driver	1	\$14.50 - \$17.75	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

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 Communication
	Business Fundamentals
	Business Performance
	Communication Skills
	Conflict Resolution
	Customer Relationship Management
	Customer Service
	Dealing with Difficult People
	Employee Engagement
	Financial Analysis
	Interpersonal Communications
	Leadership
	Logistical Operational Skills
	Marketing/Sales Techniques
	Negotiations
	Operational Skills
	Planning and Organizing
	Product Knowledge
	Project Management
	Project Requirements Analysis
	Strategic Planning
	Time Management
	Train-the-Trainer
Commercial Skills (Standard)	Backing-Up
	Basket Trailers
	Belt Trailers
	Commercial Trailer Repair
	Commercial Truck Repair
	Coupling of Doubles
	Differential Locking
	Dry Vans
	End Dumps
	Fifth Wheel and Tandem Sliding
	Flat Bed Doubles
	Gear Shifting
	Grape Trailers
	Hoppers
	Live Floors
	Off-Road Driving
	On-The-Road Skills
	Performing Truck Inspections
	Pre-Trip/Post-Trip Inspections
	Tanks
	Tight Turning and Backing Skills

Attachment 2 - Training Delivery and Curriculum Listing

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

Commercial Skills (Standard)	Tipper Operation
	Tomato Trailers (Bulk Tubs)
	Tractor and Trailer Connecting
	Welding
Computer Skills (Standard)	M/S Great Plains
	Microsoft Office (Intermediate/Advanced)
	Quickbooks
Continuous Improvement Skills	Change Management
	Creating a Quality Organization
	Cross Training
	Decision Making
	How to Coach and Mentor
	Key Performance Indicators
	Leadership Skills for Frontline Workers
	Lean Procedures Practices
	Meeting Management
	Problem Solving
	Process Improvement
	Strategic Planning
	Team Building
Management Skills	Behavior Style Strategies
	Coaching Procedures
	Decision Making
	Effective Management
	Effective Meetings for Managers
	Effective Planning for New Managers
	Finance for Technical Managers
	Leadership Skills
	Motivation
	Team Building
<i>Delivery Method /Level</i>	<i>E-Learning – Instructor Led/Distance Learning</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Business Communication
	Business Fundamentals
	Business Performance
	Communication Skills
	Conflict Resolution
	Cost Control
	Customer Relationship Management
	Customer Service
	Dealing with Difficult People
	Employee Engagement
	Financial Analysis
	Interpersonal Communications
	Leadership Marketing/Sales Techniques
	Logistical Operational Skills
	Negotiations

Attachment 2 - Training Delivery and Curriculum Listing

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

Business Skills	Operational Skills
	Planning and Organization
	Product Knowledge
	Project Management
	Project Requirements Analysis
	Strategic Planning
	Time Management
	Train-the-Trainer
Commercial Skills (Standard)	Backing-Up
	Basket Trailers
	Belt Trailers
	Commercial Trailer Repair
	Commercial Truck Repair
	Coupling of Doubles
	Differential Locking
	Dry Vans
	End Dumps
	Fifth Wheel and Tandem Sliding
	Flat Bed Doubles
	Gear Shifting
	Grape Trailers
	Hoppers
	Live Floors
	Off-Road Driving
	On-The-Road Skills
	Performing Truck Inspections
	Pre-Trip/Post-Trip Inspections
	Tanks
	Tight Turning and Backing Skills
	Tipper Operation
	Tomato Trailers (Bulk Tubs)
	Tractor and Trailer Connecting
	Welding
Computer Skills (Standard)	M/S Great Plains
	Microsoft Office (Intermediate/Advanced)
	Quickbooks
Continuous Improvement Skills	Change Management
	Creating a Quality Organization
	Cross Training
	Decision Making
	How to Coach and Mentor
	Key Performance Indicators
	Leadership Skills for Frontline Workers
	Lean Procedures Practices
	Meeting Management
	Problem Solving
	Process Improvement
	Strategic Planning
	Team Building

Attachment 2 - Training Delivery and Curriculum Listing

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

Management Skills	Behavior Style Strategies
	Coaching Procedures
	Decision Making
	Effective Management
	Effective Meetings for Managers
	Effective Planning for New Managers
	Finance for Technical Managers
	Leadership Skills
	Motivation
	Team Building

<i>Delivery Method /Level</i>	<i>Productive Laboratory</i>						
Training Type (Level)	Planned Course Offerings						
Commercial Skills	Diesel Engine Repair						
	Electrical Repair						
	Tire Repair						
	Tractor Body Repair						
	Trailer Repair						
	Welding						
<i>PL Justification and Details</i>							
Explain the need for productive laboratory (PL) training	Productive Lab training will be for the Fleet Technician trainees. Trainees will gain the ability to troubleshoot issues, maintain equipment and parts through training such as welding, trailer repair, Engine and drive train repair, tractor repair, electrical repair, and tire repair/inspections. See attached document titled "Productive Lab Justification" for additional information.						
Describe the Equipment/Processes to be used in delivering the PL training	arc welders, general welders, trailers, tractors, trucks, tires, engines, plugs, and all equipment used to test and aid in fixing the issue at hand.						
Describe Trainer Qualifications	Trainers are subject matter experts.						
Trainer to Trainee Ratios - If more than one PL class the ratios are the lowest and the highest trainer-to-trainee ratio	<table> <tr> <th>Trainer</th><th>Trainee</th></tr> <tr> <td>1</td><td>1</td></tr> <tr> <td>1</td><td>1</td></tr> </table>	Trainer	Trainee	1	1	1	1
Trainer	Trainee						
1	1						
1	1						
Ratio for One Class, or Minimum When More than One Class							
Ratio for Maximum Ratio When More than One Class							
PLT Approval	Yes						



TRAINING PROPOSAL FOR

Treehouse Private Brands, Inc

17-0847

Panel Meeting Date: 10/27/2017
Regional Office: Sacramento Regional Office
Analyst Name: Dumaurier Jordan
Type of Proposal: Single Employer
Funding Source: Out-of-State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$174,860.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$174,860.00	N/A	\$0.00	\$185,000.00

APPLICANT PROFILE

Company Summary	Treehouse Private Brands, Inc. (Treehouse) (http://www.treehousefoods.com/), is a private label food and beverage manufacturer. The Company offers an industry-leading portfolio of production capabilities, strategic vision, world-class supply chain, operational excellence and flexibility and collaborative approaches.
------------------------	--

Industry Sector(s)	Manufacturing
Priority Industry	Yes
No. Employees (Applicant)	State: 800 US: 7,000 World Wide: 16,000
Turnover Rate (Applicant)	10.00 %
Repeat Contractor	Yes
High Unemployment Area	Yes
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Treehouse's training objective is to be the leading supplier of private label food and beverage products by providing the best balance of quality and cost to its customers. Training will focus on the improvement of production efficiencies throughout the entire manufacturing process.
------------------------------	---

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	309	\$18.00	30	\$540	8 - 200
2	Job Creation – Retrainee Initiative Program, Retrainee	5	\$20.00	80	\$1,600	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

The Company was founded in 2005, and is headquartered in Oak Brook, Illinois. In 2016, Treehouse acquired Ralcorp Holdings, Inc. (Ralcorp), a subsidiary of ConAgra Foods. The company took over a manufacturing plant in Visalia, which manufactures private label food products such as pretzels, snack mix, baked goods, condiments and other snack items. These products are distributed to retail companies such as Target, Costco, Walmart and other retailers worldwide. Treehouse has several manufacturing plants; however, the Visalia location will be the only location participating in this Agreement.

This will be Treehouse's second ETP Agreement and the second in five years. In the prior contract, Treehouse assumed liability of the contract that was originally approved for ConAgra Foods.

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>Since the acquisition in February 2016, Treehouse has been implementing its Treehouse Management Operating System (TMOS), which is the Company's version of Good Manufacturing Practices and Lean Manufacturing Principles.</p> <p>Since February 2016, Treehouse has also purchased new and upgraded equipment that has or will be installed in the Visalia plant. Operational and maintenance training is required for Production and Maintenance Staff to properly operate and maintain this new equipment:</p> <p>Hayssen Packaging Equipment; Calibration Maintenance Machines; Case Automatic Labeling Machines; Flour Systems Controls Equipment; and Flow Racking Systems</p> <p>There are training topics included in the curriculum that are similar to the previous Agreement; however, trainees will not receive duplicate training. Training topics are repeated because some training could not be rolled out in the prior Agreement due to the stall in training that took place during the acquisition period.</p>
Training Infrastructure and Administrative Plan	The Training Coordinator and Support Staff will oversee the training and assist with the contract administration. The Company has also retained a third party contractor to assist with all administrative duties.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A

PROPOSED TRAINING PROJECT DETAILS

Substantial Contribution Description	N/A
---	-----

3. Curriculum Summary

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
Business Skills: Training will be delivered to Administrative Staff, Front Line Managers, Quality Assurance Staff, Supervisors, Warehouse, and Production Staff to improve analytical and soft skills. Training topics will include account development, fiscal management, and communications.	
Commercial Skills: Training will be delivered to Maintenance Mechanics Staff to improve equipment maintenance skills. Maintenance staff will receive training in topics such as food grade welding and product conveying systems repair and calibration.	
Computer Skills: Training will be delivered to all staff except Sanitation and Warehouse Staff members. Trainees will receive training in Intermediate and Advanced Microsoft Office to improve software proficiencies.	
Continuous Improvement: Training will be delivered to all staff except Administrative Staff, Front Line Managers and Quality Assurance staff. To improve production efficiencies, staff will receive training in Lean Manufacturing and the Treehouse Management Operating System.	
Manufacturing Skills: Training will be delivered to all trainees except Administrative Staff. Training will focus on production equipment operation and Advanced Food Product Safety.	

Delivery Method/Level	Productive Laboratory
Summary	
Manufacturing Skills - Training will be delivered to Production Supervisors, Production and Maintenance Staff. Productive Lab training will focus on production equipment operation and maintenance skills. Treehouse will train staff in the operation/maintenance of new equipment.	

4. Additional Company or Training Project Details

Productive Lab Justification Summary

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

Treehouse is requesting PL training for Production, Maintenance and Frontline Supervisors. Equipment to be used during PL includes Hayssen Packaging equipment, Flow Racking Systems, Calibration Maintenance machines and Case Automatic Labeling machines. Trainees will receive hands-on training specific to the operation and maintenance of the equipment. Training will be taught by subject matter experts who have demonstrated knowledge and expertise in the field. PL will be capped at 10 hours per trainee. Treehouse is requesting a 1:2 trainer-to-trainee ratio because some equipment requires more than one person to operate.

Production is expected to be slowed during the PL training as the trainer will be stopping production to coach and mentor trainees. Also, the equipment will be operating at a slower speed until trainees show they are capable of moving at a faster pace.

PROPOSED TRAINING PROJECT DETAILS

High Unemployment Area

This is a region with Unemployment exceeding the state average by 15%. The wage may be modified by up to 25% if post-retention wages exceed the start-of-training wages. The Company's location in Tulare County qualifies for this waiver; however, Treehouse is not requesting a wage modification for their trainees.

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

The applicant has retained the services of the following Subcontractors.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Strategic Business Solutions, LLC	Visalia	\$ 8,250.00
Administrative	Strategic Business Solutions, LLC	Visalia	13% of funding earned
Training	To Be Determined	N/A	N/A

4.3 Previous ETP Project Summary

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

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
ET16-0107	Visalia	08/03/15 – 08/02/17	\$304,000	\$181,892	60%
Notes	Treehouse acquired Ralcorp. from ConAgra and had to stop training because they were in the process of being acquired. Now that the acquisition is complete Treehouse has the proper staff in place and are dedicated to training their staff. Due to low performance in the ET16-0107, this Agreement was right-sized.				

PROPOSED TRAINING PROJECT DETAILS

4.4 Supporting Panel Proposal Documentation

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

Attachment 1 - Group and Job Title Details

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

Group # 1: Retrainee			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
<i>Tulare County/HUA - 9945 West Goshen Ave., Visalia (ETP Required Wage: \$12.12)</i>			
Administrative Staff	4	\$21.00 - \$29.00	\$0.00
Front Line Manager	4	\$24.00 - \$50.00	\$0.00
Maintenance Mechanics	20	\$19.00 - \$29.00	\$0.00
Production Staff	210	\$14.85 - \$24.00	\$0.00
Quality Assurance	17	\$17.00 - \$18.00	\$0.00
Sanitation	21	\$15.50 - \$19.00	\$0.00
Supervisors	7	\$22.00 - \$28.00	\$0.00
Warehouse Staff	26	\$15.50 - \$17.50	\$0.00

Group # 2: Retrainee/Job Creation – Retrainee Initiative Program			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
<i>Tulare County/HUA - 9945 West Goshen Ave., Visalia (ETP Required Wage: \$10.50)</i>			
Production Staff	5	\$14.85 - \$15.20	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	Planned Course Offerings
Business Skills	Account Development Effective Communications Fiscal Management
Commercial Skills (Standard)	Equipment gauges and controls Food Grade Welding Product Conveying Systems repair and calibration Pump Repair
Computer Skills (Standard)	Intermediate and Advanced Microsoft Office
Continuous Improvement Skills	Advanced Lean Manufacturing Treehouse Management Operating System
Manufacturing Skills (ME) (Standard)	Advanced Food Product Safety Case Automatic Labelers Flour Systems Controls Flow Racking Systems Hayssen 8 & 9 Optimization Production Equipment Operation

Delivery Method /Level	Productive Laboratory
Training Type (Level)	Planned Course Offerings
Manufacturing Skills (ME) (Standard)	Case Automatic Labelers Flour Systems Controls Flow Racking Systems Hayssen 8 & 9 Optimization Production Equipment Operation

PL Justification and Details

Explain the need for productive laboratory (PL) training	Treehouse Foods has purchased, or is planning to purchase new production and packaging equipment for the plant floor. This equipment will increase efficiencies and capacity. Training is required to insure proficiency at production speeds, capacities, and quality standards. Occupations involved in training will be Production, Maintenance, Warehouse, Quality, and Front Line Supervisors	
Describe the Equipment/Processes to be used in delivering the PL training	Hayssen Packaging Equipment - Calibration, operation, maintenance. Cost \$700,000 - 2.5 Hours Production Line Fire Suppression System - Calibration, maintenance, monitoring - \$600,000 - 1 hour Flour Mixing Systems Controls Upgrade - Calibration, operation, troubleshooting- \$400,000 - 2.5 hours Case Automatic labeling machines: Operation, calibration, troubleshooting - \$ 150,000 2.5 hours Warehouse Flow Through racking system - Operation, \$400,000 - 2 hours	
Describe Trainer Qualifications	Trainers will be vendor trained and certified and approved by TreeHouse as subject matter experts.	
Trainer to Trainee Ratios - If more than one PL class the ratios are the lowest and the highest trainer-to-trainee ratio	Trainer	Trainee
Ratio for One Class, or Minimum When More than One Class	1	2
Ratio for Maximum Ratio When More than One Class	1	2
PLT Approval	No	



TRAINING PROPOSAL FOR
W.E. O'NEIL CONSTRUCTION CO. OF CALIFORNIA
17-0675

Panel Meeting Date: 10/27/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Margarita Paccarelli
Type of Proposal: Single Employer
Funding Source: Out-of-State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$111,240.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$111,240.00	N/A	\$0.00	\$123,600

APPLICANT PROFILE

Company Summary	W.E. O'Neil Construction Co. of California (WEOCC) is a full-service construction company. Its customer base includes government and civic agencies, public and private corporations, and institutions across a diverse spectrum of construction delivery methods.
------------------------	--

Industry Sector(s)	Construction
Priority Industry	Yes
No. Employees (Applicant)	State: 154 US: 363 World Wide: 363
Turnover Rate (Applicant)	5.00 %
Repeat Contractor	No

High Unemployment Area	No
Union(s)	No

TRAINING PROFILE

Training Objective(s)	WEOCC will train employees on construction techniques, new products, materials and methodologies.
------------------------------	---

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	103	\$18.00	60	\$1,080	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

WEOCC has provided quality construction services for over 30 years with offices in Los Angeles, Ontario, San Diego, Chicago, Denver, Nashville, Phoenix and Tucson. As an industry leader, WEOCC brings extensive experience in the area of construction management and general contracting services with specific skills sets in preconstruction, budgeting, construction management, general contracting, Building Information Modeling (BIM), Design-Build and Special Project.

This will be WEOCC's first ETP Agreement.

2. Current Training Project Details

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

PROPOSED TRAINING PROJECT DETAILS

Purpose of Training	<p>The construction industry is constantly evolving and in order for the WEOCC to be successful and remain competitive, the Company must train its employees. The proposed training will focus on the following:</p> <ul style="list-style-type: none"> ➤ Construction Techniques – It is critical for staff to be current with the latest construction techniques to improve knowledge and efficiency with installation, along with understanding the safety risks this technique can generate. ➤ New Materials and Methodologies – New products and methodologies require staff to be properly trained, and in certain cases, certified to supervise the installation. This includes improvements in waterproofing systems, exterior facades such as EIFS, foundation improvements, water recycling processes and green building requirements. ➤ Technology Advancement – The construction industry has made great strides in introducing technology into the workplace over the past decade and these products are constantly evolving. As an example, BIM allows staff to coordinate the installation in a 3D environment prior to work commencing in the field. Failure to keep up with this technology will restrict the ability to compete and succeed in the business. Other technology tools that will require training for its staff include Primavera Scheduling Software, Textura Payment Processing, Bluebeam and Plan Grid. <p>The proposed training will be provided to its employees in El Segundo, Rancho Cucamonga and San Diego locations.</p>
Training Infrastructure and Administrative Plan	<p>WEOCC's Operations Assistant will oversee training and internal project administration. The Company has several in-house experts to provide training at all locations. Training vendors may be retained for other course topics such as OSHA 10 and 30.</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 in-house Class/Lab Computer, Commercial, Continuous Improvement, Hazardous Materials, and OSHA 10/30 training.	

Delivery Method/Level	E-Learning - Instructor Led/Distance Learning
Summary	
Some training will be conducted via WebEx online training when the need to interact in person is not as critical. This training will be conducted by in-house subject matter experts although a small percent (approximately 10%) may be provided by outside subject matter experts.	

4. Additional Company or Training Project Details

4.1 Program Waivers

No waivers have been requested

4.2 Subcontractor Summary

The applicant has not retained the services of a Subcontractor.

4.3 Previous ETP Project Summary

4.4 Supporting Panel Proposal Documentation

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

Attachment 1 - Group and Job Title Details

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

Group # 1: Retrainee			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
Los Angeles County - 909 N SEPULVEDA BLVD, El Segundo (ETP Required Wage: \$16.96)			
Engineer	35	\$20.00 - \$49.00	\$0.00
Project Administrator	12	\$20.00 - \$49.00	\$0.00
Project Superintendent	33	\$22.00 - \$51.00	\$0.00
San Bernardino County - 9485 HAVEN AVE., Rancho Cucamonga (ETP Required Wage: \$16.16)			
Project Administrator	4	\$20.00 - \$49.00	\$0.00
Project Superintendent	12	\$22.00 - \$51.00	\$0.00
San Diego County - 11633 Sorrento Valley Road, San Diego (ETP Required Wage: \$16.72)			
Engineer	1	\$20.00 - \$49.00	\$0.00
Project Administrator	2	\$20.00 - \$49.00	\$0.00
Project Superintendent	4	\$22.00 - \$51.00	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

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
Commercial Skills (Safety)	OSHA 10 (requires completion of 10 hours)
	OSHA 30 (requires completion of 30 hours)
Commercial Skills (Standard)	Design-Build
	New Industries - Assisted Living Centers
	New Industries - Condos/Multi-Family Residences
	New Industries - Hi-Rise Developments
Computer Skills (Standard)	Advanced CMIC Construction Software
	BIM 3D Imaging & Modeling
	Bluebeam PDF Solutions
	Customer Relationship Management Proprietary
	Estimating & Project Management Software
	Existing Software Interface for Reporting -Safety Mojo
	Microsoft Office (Excel, Word, Access)
	P6/Primavera Project Planning & Scheduling
	People Strategy Human Capital Management
	PlanGrid Construction Software
	Scheduling Software
	Textara Pay Project Accounting Pay Application
Continuous Improvement Skills	Development Client Relationships
	Leadership Skills
	Lean Skills
	Managing Growth & Change Management
	Performance Management for New Initiatives
	Team Building
Hazardous Materials Skills	Environmental Management of Hazardous Materials
	Hazardous Materials Handling



TRAINING PROPOSAL FOR
EASTWESTPROTO, INC. dba LIFELINE AMBULANCE
17-0891

Panel Meeting Date: 10/27/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Monique Webb
Type of Proposal: Single Employer
Funding Source: SET

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$ 316,000.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 316,000.00	N/A	\$ 0.00	\$ 375,000.00

APPLICANT PROFILE

Company Summary	EastWestProto, Inc. dba Lifeline Ambulance (Lifeline) provides customized, inter-facility, non-emergency ambulance transport services. Lifeline contracts with large hospital networks, healthcare systems, medical groups, and skilled nursing facilities.

Industry Sector(s)	Healthcare		
Priority Industry	Yes		
No. Employees (Applicant)	State: 255	US: 255	World Wide: 255
Turnover Rate (Applicant)	6.00 %		
Repeat Contractor	Yes		

High Unemployment Area	No
Union(s)	No

TRAINING PROFILE

Training Objective(s)	Lifeline will expand its workforce in order to meet demand for inter-facility transport services for new hospital clients. Training will cover patient care, use of Electronic Medical Records software for daily reporting, equipment usage, and general medical knowledge.
------------------------------	--

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	200	\$ 20.00	79	\$ 1580	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

EASTWESTPROTO, INC., dba Lifeline Ambulance (Lifeline), was founded in 2002, and is headquartered in Montebello, CA. The Company is a rapidly growing provider of non-emergency inter-facility ambulance services throughout Los Angeles and Orange Counties. Lifeline provides ambulance service 7-days a week, 24- hours per day and is expanding its workforce by up to 200 net new jobs.

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

2. Current Training Project Details

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

PROPOSED TRAINING PROJECT DETAILS

Purpose of Training	<p>Employment in the ambulance service sector has grown by 25% in the United States between 2005 and 2010. Additionally, approximately 18% of the U.S. population will be 65 years or older by 2030, up from 13% in 2010. This rise in higher acuity patients is not limited to the geriatric population; the 40-50-year age brackets are also experiencing high degrees of acuity with complex medical conditions such as diabetes, stroke, and cardiac conditions. As a result, Lifeline has also experienced an increase in the number of ground transports for patients with complex medical conditions.</p> <p>This Job Creation proposal will help Lifeline hire and train 160 Emergency Medical Technicians, 14 Registered Nurses, 12 Dispatchers and 13 Billing Specialists in new job skills. Training will include Standard Operating Procedures, County EMS Protocol, Electronic Patient Care Reporting Software, HIPAA, ID Theft, Hazmat, Airborne Pathogens, Bloodborne Pathogens, Customer Service, Documentation, and EMS Policies & Procedures. Training will be delivered by in-house instructors.</p> <p>The Company will provide curriculum and a supportive training staff that includes EMS professionals. Over the last two years the Company has successfully trained a total of 198 newly hired workers with an average of 100 training hours. ETP funding will serve as the financial catalyst to enable the new employees of the Montebello facility to transition from entry-level, to medical healthcare professionals with leadership skills.</p> <p>Under the prior ETP Agreement (ET15-0376), training was based on the Company's plan to expand its workforce. This proposal reflects continued hiring and training to obtain new contracts with Kaiser Permanente facilities in Los Angeles and Orange Counties, and Providence Health Systems that include a total of six acute care hospitals in Los Angeles County.</p>
Training Infrastructure and Administrative Plan	Lifeline's Education Staff will provide and document all training over the duration of this Agreement. The Company has also hired a third-party administrator, National Training Systems, Inc. to perform administrative duties.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	Although Lifeline Ambulance is a repeat contractor with total earnings in excess of \$250,292 in the past five years, a total of \$226,323 was earned under the Job Creation Initiative. As a result the Substantial Contribution is waived.

3. Curriculum Summary

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

PROPOSED TRAINING PROJECT DETAILS

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
Billing Specialists, Dispatchers, Registered Nurses, and Emergency Medical Technicians will receive Business, and Computer Skills training as shown in detail in Attachment 2 of the proposal.	

Delivery Method/Level	Productive Laboratory/Medical Skills Training w/ Preceptor
Summary	
Registered Nurses and Emergency Medical Technicians will receive Medical Skills/Preceptor and Didactic training. An instructor will monitor and document the trainee's progress to meet healthcare standards in transport techniques and medical skill sets.	

4. Additional Company or Training Project Details

4.1 Program Waivers

The Company is not requesting waivers.

4.2 Subcontractor Summary

Lifeline has retained the services of the following Subcontractor(s).

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	National Training Systems, Inc.	Ladera Ranch	\$12,640
Administrative	National Training Systems, Inc.	Ladera Ranch	13% of payment earned
Training	N/A	N/A	N/A

4.3 Previous ETP Project Summary

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

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
ET15-0376	Montebello	02/02/15-02/01/17	\$314,548	\$250,292	79%

PROPOSED TRAINING PROJECT DETAILS

4.4 Supporting Panel Proposal Documentation

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

Attachment 1 - Group and Job Title Details

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

Group #1: Retrainee/Job Creation – Retrainee Initiative Program			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
<i>Los Angeles County - 1120 S MAPLE AVE STE 200, Montebello (ETP Required Wage: \$14.13)</i>			
Billing Specialist	13	\$14.00 - \$18.00	\$0.13
Dispatcher	13	\$18.00 - \$21.00	\$0.00
Emergency Medical Technician	160	\$14.13 - \$17.00	\$0.00
Registered Nurse	14	\$31.00 - \$55.00	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

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)	Atlas Software
	Candidate Care Software
	ePCR Software Skills
	Tablet Training
Continuous Improvement Skills	Ambulance Operation Skills
	Call Center & Dispatch Protocols
	Communication Skills
	Conflict Resolution
	Crisis Prevention & Intervention (CPI)
	Critical Thinking
	Customer Service
	Documentation Skills
	EMS Communication & Protocols
	EVOC (Emergency Vehicle Operations)
	Leadership Skills
	Performance & Quality Improvement
	Preceptor Skills (Train-the-Trainer)
	Standard Operating Procedures
Medical Skills (didactic)	Airborne Pathogens
	Basic Life Support (BLS)
	Bloodborne Pathogens
	Body Mechanics
	Cardiac Assessment
	Care of and Treatment of Shock Patients
	Care of Cardiac Patients
	Care of Geriatric Patients
	Care of the Bariatric Patient
	Care of the Renal Patient
	Care of the Stroke Patient
	Chronic Obstructive Pulmonary Disease (COPD)
	Code Blue Response and Procedures
	Critical Care Skills
	Decontamination Procedures
	Dysrhythmia Recognition & Interpretation
	EKG & Cardiac Monitors
	Emergency Medical Technician (EMT) Skills
	Equipment Operation Skills
	Hazardous Materials/Protection
	HIPPA
	Medical Transport of High-Risk Patients
	Medication Administration & Reconciliation
	Neonatal Intensive Care Unit (NICU) Transport
	Neurological Assessment& Pre-Hospital Care
	Orthopedic Assessment& Pre-Hospital Care

Attachment 2 - Training Delivery and Curriculum Listing

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

Medical Skills (didactic)	Orthopedic Stabilization & Traction
	Oxygen Administration
	Pain Management
	Patient Assessment & Pre-Hospital Care
	Pediatric Intensive Care
	Pediatric Patient Care
	Pharmacology & Pharmacokinetics
	Pre-Hospital Trauma Life Support
	Psychiatric Patient Care
	Respiratory Arrest
	Respiratory Assessment & Pre-Hospital Care
	Restraints
	Standards of Care
	Ventilator Operation

Delivery Method /Level	Productive Laboratory		
Training Type (Level)	Planned Course Offerings		
Medical Skills (preceptor)	Advanced Cardiac Life Support		
	Ambulatory Patient Care Training		
	Cardiac Patient Care		
	Code Blue Response and Procedures		
	Critical care Transport		
	Equipment Operation		
PL Justification and Details			
Explain the need for productive laboratory (PL) training	Clinical or field training is a standard in the Ambulance Industry as it is in other healthcare organizations. The clinical trainer, also know as a preceptor or field training officer must provide orientation, mentoring and process guidance to new EMTS, Paramedics and Nurses as they learn to become effective employees for LifeLine Ambulance.		
Describe the Equipment/Processes to be used in delivering the PL training	The Preceptor or Field Training Officer is an experienced EMS provider and transfers a deep understanding of emergency medical regulations, procedures, knowledge of equipment used in emergency care, current knowledge of emergency medical procedures, communications with bystanders and patients, and the ability to attend to medical emergencies of patients being transported.		
Describe Trainer Qualifications	The trainer possesses deep understanding of emergency medical service regulations, policies and procedures, knowledge of ambulance equipment and the ability to attend to patients.		
Trainer to Trainee Ratios - If more than one PL class the ratios are the lowest and the highest trainer-to-trainee ratio		Trainer	Trainee
Ratio for One Class, or Minimum When More than One Class		1	1
Ratio for Maximum Ratio When More than One Class		1	2
PLT Approval	No		



TRAINING PROPOSAL FOR
Lockheed Martin Corporation
17-0777

Panel Meeting Date: 10/27/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Monique Webb
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$ 400,602.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 471,296.00	N/A	\$ 70,694.40	\$ 1,152,000.00

APPLICANT PROFILE

Company Summary	Lockheed Martin Aeronautics Company (LM Aero), a division of Lockheed Martin, designs and manufactures advanced military aircraft in the city of Palmdale. The Company utilizes the latest in aerospace technology and equipment to meet customer demand. This will be the eighth Agreement between the Employment Training Panel and LM Aero, and the fourth in the last five years.
------------------------	---

Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. of Employees (Applicant)	State: 9,200	US: 89,000	World Wide: 96,000

Turnover Rate (Applicant)	4.00 %
Repeat Contractor	Yes
High Unemployment Area	Yes
Unions	Intl Association of Machinists / District 725, Area 4

TRAINING PROFILE

Training Objective	LM Aero must remain up-to-date in technological advancements to improve manufacturing capabilities and provide their contractors with the latest advancements in the aerospace industry. The curriculum addresses a wide array of training needs for production workers, engineers, and business operations personnel.
---------------------------	--

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	718	\$ 18.00	32	\$ 576	8 - 200
2	Retrainee, Veterans Program	82	\$ 22.00	32	\$ 704	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

LM Aero is engaged in the research, design, development, manufacture, integration, sustainment, support, and upgrade of advanced military aircraft. This includes combat and air mobility aircraft, unmanned air vehicles, and related technologies. Training will take place at the Company's Palmdale facility, and at nearby Edwards Air Force Base. LM Aero employs approximately 2,800 employees between both locations.

LM Aero's customers include the US military services and various other government agencies of the US and other countries.

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

Over the last year, LM Aero's Advanced Development Programs group has been awarded several new projects. Although the projects are classified, and details cannot be disclosed, these projects generally involve futuristic concepts and designs that will integrate the most advanced technologies in the production process. As a result, the preponderance of training in this proposal will be on new skills needed for these projects, specifically for Engineers.

Such skills will include programming language, development platforms, and software tools used for design, analysis, and testing. Engineering courses will also be provided to create quality control for designing, integrating, and configuring software and systems on aircraft. There will also be extensive training in cybersecurity.

Trainees will also learn to utilize 3D printing and laser technology in various aspects of the production process. Training in a variety of advanced aeronautical topics will be delivered (e.g. aero elasticity, electronic warfare, hypersonic, conceptual designs, and radar systems).

Training under this project will include training for business operations personnel to enhance financial and contract skill sets. Training will increase staff knowledge in cost analysis, and cost estimates. Production Staff will receive training in a number of proprietary techniques leveraging new production equipment, robotics, and automation. This will allow workers to earn production-related certifications and qualifications.

PROPOSED TRAINING PROJECT DETAILS

	All training includes new or updated curriculum topics from the prior ETP Agreement (ET15-0152). No trainee will receive duplicate training from the prior Agreement.
Training Infrastructure and Administrative Plan	<p>Training will be delivered by in-house experts from LM Aero. In-house staff will also oversee training at the Palmdale location and work with Marquis Group to perform administrative duties. The Company's LMS has been reviewed and approved by ETP staff for documentation of all training.</p> <p>The Company's current training budget for Palmdale is \$3 million.</p>
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	LM Aero is a repeat contractor with payment earned in excess of \$250,000 at the Palmdale facility within the past five years. (See Prior Project Table.) Accordingly, reimbursement for trainees at the facility in Job Numbers 1 and 2 will be reduced by 15% to reflect the Company's \$70,694 Substantial Contribution to the cost of training.

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
Engineering Staff will receive Computer, and Continuous Improvement Skills training; Business Managers, Finance and Business Operations Staff will receive Business, Computer, and Continuous Improvement Skills training; and Production Staff will receive Manufacturing and Continuous Improvement Skills training.	

4. Additional Company or Training Project Details

4.1 Program Waivers

The Company is requesting an alternate retention period:

Waivers	Description
Retention Period for Veterans	Alternate Retention Period: 500 hours within 272 consecutive days, working full-time with one or more Employers

PROPOSED TRAINING PROJECT DETAILS

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or %
Development	Marquis Group	Volente, Texas	\$ 26,000.00
Administrative	Marquis Group	Volente, Texas	13% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

The table below summarizes performance under an active ETP contract held by Lockheed Martin Space Systems Division (SSD) in Sunnyvale. Both LM Aero and SSD are owned by Lockheed Martin Corporation, but they are separate operating units.

Active Contract(s) Elements	Summary
Contract Number	ET16-0227
Purpose of Training	The training curriculum included technical topics linked to new manufacturing and technologies to improve operations at the Sunnyvale location (Space Systems Division).
Location(s)	Sunnyvale
Term	11/09/15-11/08/17
Approved Amount	\$ 748,880
Projected Earnings	\$505,982
Performance Percentage	68%
Trainee Details	946
Other Notes	This project was administered by Lockheed Martin Space Systems Company, a separate division of Lockheed Martin. Training for this Agreement took place solely in Sunnyvale; a total of 27,526 training hours have been entered via the ETP Online Tracking System. Approximately 917 trainees have completed the 8-hour minimum requirement for possible reimbursement.

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

Previous Contract Activity					
Agreement Number	Locations	Term	Approved Amount	Project Earnings	Performance %

PROPOSED TRAINING PROJECT DETAILS

ET15-0152	Palmdale	07/07/14- 07/06/16	\$524,880	\$524,880	100%
ET12-0303	Sunnyvale	03/26/12- 03/25/14	\$180,000	\$174,421	96%

4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 show additional details on the intended trainee population, the curriculum, and associated program characteristics.

Attachment 1 - Group and Job Title Details

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

Group # 1: Retrainee			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
Los Angeles County/HUA - 1011 Lockheed Way, Palmdale (ETP Required Wage: \$16.96)			
Engineer I	81	\$27.25 - \$37.98	\$0.00
Engineer II	207	\$37.50 - \$62.50	\$0.00
Engineer III	54	\$61.54 - \$86.54	\$0.00
Engineering & Business Managers I	36	\$57.69 - \$76.92	\$0.00
Engineering & Business Managers II	16	\$75.96 - \$105.95	\$0.00
Finance & Business Operations I	36	\$23.08 - \$30.76	\$0.00
Finance & Business Operations II	45	\$29.81 - \$52.88	\$0.00
Finance & Business Operations III	27	\$51.44 - \$67.31	\$0.00
Production I	189	\$18.20 - \$36.56	\$0.00
Production II	27	\$36.57 - \$48.00	\$0.00

Group # 2: Retrainee/Veterans Program			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
Los Angeles County/HUA - 1011 Lockheed Way, Palmdale (ETP Required Wage: \$16.96)			
Engineer I	9	\$27.25 - \$37.98	\$0.00
Engineer II	23	\$37.50 - \$62.50	\$0.00
Engineer III	6	\$61.54 - \$86.54	\$0.00
Engineering & Business Managers I	4	\$57.69 - \$76.92	\$0.00
Engineering & Business Managers II	4	\$75.96 - \$105.95	\$0.00
Finance & Business Operations I	4	\$23.08 - \$30.76	\$0.00
Finance & Business Operations II	5	\$29.81 - \$52.88	\$0.00
Finance & Business Operations III	3	\$51.44 - \$67.31	\$0.00
Production I	21	\$18.20 - \$36.56	\$0.00
Production II	3	\$36.57 - \$48.00	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

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	
	Estimating and Cost Management
	Finance Processes and Accounting
Computer Skills (Standard)	
	Abaqus Standard-Explicit
	Actran
	Applying UML for Real-Time
	C#
	C++
	CATIA V5
	CISSP
	Coverity
	Ethical Hacking
	FiberSIM for CATIA V5
	HTML5 with Javascript
	Java, Javascript & JQuery
	Kalman Filtering
	Linux
	Matlab
	ModelCenter Integrate
	Nastran and Patran
	Programming with Qt
	Red Hat
	Secure Programming
	Secure Software Development
	Security+
	SimSIL
	SQL Programming
	VersionOne Metrics & Health Check
	Visual Studio
	Wind River Simics & VxWorks
	XML

Attachment 2 - Training Delivery and Curriculum Listing

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

[illegible]

Attachment 2 - Training Delivery and Curriculum Listing

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

	Photogrammetry
	Program Management
	Project Management
	Quality 101
	Radar
	Root Cause Analysis
	Shainin
	Six Sigma Green & Black Belt
	Software Technical Information (SWTI)
	Statistical Process Control (SPC)
	Subcontract Management
	Supplier & Core Quality
	Systems Engineering Bootcamp
	Team Leadership
	Tools for Emerging Leaders
Manufacturing Skills (ME) (Standard)	
	3D Printing
	Composites Layup
	Electrical Systems
	Low Observable Paint & Coatings
	Robotics & Automation
	Structures Assembly



September 7, 2017

Ms. Monique Webb
Contract Analyst
North Hollywood Regional Office
Employment Training Panel (ETP) Program
4640 Lankershim Blvd., Suite 311
North Hollywood, CA 91602

Dear Ms. Webb:

On behalf of the The International Association of Machinists and Aerospace Workers (IAM), I would like to confirm our support for the training program identified in Lockheed Martin Aeronautics Company's application to the California Employment Training Panel (ETP) Program. The planned training will directly benefit our members by improving their technical skills and knowledge in aircraft structures, robotics, composites, painting and coatings, and in various aspects of manufacturing quality.

The Aerospace Industry is on the forefront of technological innovation, and our member's skill sets must keep pace with these technology enhancements, improved manufacturing processes, and equipment upgrades. Employee retraining to meet these challenges is one of the primary goals of our union.

We appreciate the steps Lockheed Martin Aeronautics Company is taking to invest in the skills of its workforce. Accordingly, the International Association of Machinists and Aerospace Workers (IAM), provides our endorsement of this application providing enhanced training activity for our membership.

Sincerely,

Penny C. Meeden
IAMAW District 725
Business Representative
39047 10th Street East
Palmdale, CA.93550
Office: 661-273-1433
Cell: 661-717-4908
Email: pmeeden@iam725.org



RETRAINEE - JOB CREATION

Training Proposal for:

Omni Hotels Management Corporation dba Omni La Costa Resort and Spa

Agreement Number: ET18-0141

Panel Meeting of: October 27, 2017

ETP Regional Office: San Diego

Analyst: M. Ibarra

PROJECT PROFILE

Contract Attributes:	Retrainee Job Creation Initiative	Industry Sector(s):	Services Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Counties Served:	San Diego, San Francisco, Riverside, and 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: 2,840	U.S.: 9,160	Worldwide: 12,000
<u>Turnover Rate:</u>	5%		
<u>Managers/Supervisors:</u> (% of total trainees)	18%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$251,600		\$79,800 50% - Job Number 2	\$0		\$171,800

In-Kind Contribution:	100% of Total ETP Funding Required	\$276,000
-----------------------	------------------------------------	-----------

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	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement	400	8 - 200	0	\$225	\$16.16
				Weighted Avg: 15			
2	Retrainee	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement	380	8 – 200	0	\$210*	\$16.96
				Weighted Avg: 28			
3	Retrainee Job Creation Initiative	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement	10	8 – 200	0	\$200	**\$13.94
				Weighted Avg: 10			

*Reflects 50% Substantial Contribution (Los Angeles facility).

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

Minimum Wage by County: Job Number 1: \$16.16 per hour for Riverside County, \$16.72 per hour for San Diego County, and \$17.63 per hour for San Francisco County; Job Number 2: \$16.96 per hour for Los Angeles County; and Job Number 3 (Job Creation): \$13.94 per hour for San Diego County.

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

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

Health Benefits of up to \$4.35 per hour in Job Number 1; up to \$1.30 per hour in Job Number 2; and up to \$3.42 per hour in Job Number 3 may be used to meet the Post-Retention Wage.

Service Charge: Mandatory Service Charges (banquet tips) of up to \$1.30 per hour in Job Number 2 (Los Angeles) may be used for Food and Beverage/Banquet Staff who do not elect health benefits to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1: San Diego County (Retrainee)		
Administrative Staff	\$14.23 - \$16.62	50
Culinary Staff	\$15.16 - \$19.97	5

Guest Services	\$12.37 - \$19.73	65
General Support Staff	\$12.82 - \$20.42	50
Manager/Supervisor	\$21.71 - \$37.65	55
Job Number 1: San Francisco County (Retrainee)		
Administrative Staff	\$15.02 - \$18.81	10
Culinary Staff	\$16.99 - \$21.88	5
Guest Services	\$14.08 - \$20.75	10
General Support Staff	\$15.43 - \$21.44	25
Manager/Supervisor	\$23.71 - \$39.11	30
Job Number 1: Riverside County (Retrainee)		
Administrative Staff	\$14.51 - \$17.61	25
Culinary Staff	\$15.63 - \$21.18	10
Guest Services	\$11.81 - \$19.95	25
General Support Staff	\$12.56 - \$20.73	15
Manager/Supervisor	\$22.97 - \$37.82	20
Job Number 2: Los Angeles County (Retrainee)		
Administrative Staff	\$15.72 - \$17.17	40
Culinary Staff	\$16.15 - \$22.65	20
Guest Services	\$15.69 - \$20.81	30
General Support Staff	\$15.73 - \$20.34	50
Engineer	\$17.09 - \$23.73	10
Housekeeping Staff	\$15.66 - \$19.27	40
Maintenance Staff	\$16.91 - \$20.66	30
Food and Beverage/Banquet Staff	*\$15.70 - \$26.91	120
Manager/Supervisor	\$22.81 - \$37.11	40
Job Number 3: San Diego County (Retrainee Job Creation)		
Administrative Staff	\$13.07 - \$16.03	2
Guest Services	\$10.52 - \$12.95	4
General Support Staff	\$10.57 - \$15.14	2
Manager/Supervisor	\$21.65 - \$30.42	2

*Mandatory Service Charge (banquet tips) of \$1.30 per hour may be used for Food and Beverage/Banquet Staff who do not elect health benefits to meet the Post-Retention Wage.

INTRODUCTION

Originally built in 1964, Omni Hotels Management Corporation dba Omni La Costa Resort and Spa (Omni La Costa) (www.lacosta.com), is a historic golf resort and spa located on 400 acres in Carlsbad. It provides luxury accommodations, resort golf courses, and convention/conference

resources to corporate businesses and upscale worldwide leisure travelers. Omni La Costa's parent company, TRT Holdings, Inc., also owns four Omni facilities located in the cities of San Diego, San Francisco, Rancho Mirage, and Los Angeles. All five proposed facilities operate under the same California Employer Account Number (CEAN). All facilities specialize in luxury lodgings targeted to business travelers and tourists. In addition to room accommodations, the properties offer business and fitness centers; high-speed and wireless internet access; and gourmet restaurants. The facilities also provide space for weddings, special occasions, and meetings.

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

Prior Performance

All five Omni facilities have participated in ETP projects in the past. This will be Omni La Costa's sixth ETP Agreement and its third within the past five years. Omni La Costa's first ETP project also included facilities in San Diego, San Francisco, and Rancho Mirage.

Omni La Costa's first ETP project was targeted to train incumbent and newly-hired workers at the facility in Carlsbad only. Subsequent to the approval of the Omni La Costa (Carlsbad) Agreement, the contract was amended to include San Diego, San Francisco, and Rancho Mirage facilities to participate in the training plan with six months left in the 21-month training period. The facilities were able to deliver significant Guest Service Skills training (Business Skills) which positively improved the job skills of frontline workers and also improved efficiencies at the Hotels. Workers were able to effectively serve guests which demonstrated an improvement in room operations skills. Overall, the facilities provided training to 681 trainees, of which, 282 trainees (41%) successfully completed training (required minimum of 8 hours) and retention, with a weighted average training hours of 20, per trainee.

Omni Los Angeles previous ETP projects focused on implementing various process improvement processes within the Facility. This included a new strategy for guest accommodations, catering, conference rooms, and housekeeping. ETP-funded training helped Omni Los Angeles transform its facility into a more modern hotel with custom themes and menus. In its most recent ETP project, Omni Los Angeles provided skills training to all frontline employees which improved productivity as well as customer service, complaint resolution, and customer-focused selling. The facility provided training to 328 trainees, of which, 266 trainees (81%) successfully completed training (required minimum of 24 hours) and retention, with a weighted average training hours of 72, per trainee.

PROJECT DETAILS

According to the Association for Corporate Travel Executives and American Express Global Business Travel, customer's interest in adding leisure to business trips jumped 43% in a six-month period between September 2016 and March 2017. As a result, business travelers are tacking on leisure time to their business trips, creating opportunities for hotels to book longer stays. Blending business and leisure travels are key demand indicators for spurring growth in bookings within the lodging industry.

Coupled with the anticipated increased demand for extended stay accommodations, Company representatives report that an increasing number of younger generations are now spending more on lodging and other related accommodations/activities than ever before. As a result, technology has become critical in attracting and retaining customers in all age groups, and today, this means

investing in an improved, wide range of technological solutions that create immediate and personal consumer engagement.

In order to successfully support increasing and shifting customer expectations, Omni is committed to developing a strategic plan to improve its technological applications and processes specifically in payment security, guest room technology, bandwidth for internet connection, and mobile engagement to suit different needs and cater to all groups of consumers. The Company also plans to translate complex back-office data analytics into user-friendly systems that will enable front-of-house staff to personalize guest experiences.

These initiatives will allow customers to easily make reservations on hotel stays and other accommodations or activities via any smart device as well as engage through available messaging channels inside and outside of a mobile application. It will allow access to not only personalize the immediate hotel environment, but also guests' overall destination experience to ensure customers are connected with the best places to visit.

ETP funding will allow Omni to continually implement its customer service training programs within the Facilities. In this proposal, funding will also allow Omni to ensure staff is knowledgeable and skilled in technical areas of hospitality in order to deliver positive customer experiences, build effective short and long-term relationships with its customers, and support technological improvement goals.

Training Plan

The proposed training plan will build upon training delivered in the past projects. Some training delivered in the previous projects will be repeated; however, Omni ensures that it will not be delivered to the same incumbent workers. All facilities will continue to provide a significant amount of business skills training focusing on several topics specifically to improve customer service. Concurrently, Omni will also deliver computer skills training alongside the customer service skills training in order to support overall business goals mentioned above.

Training will be provided to approximately 790 incumbent and newly-hired trainees in the following skills:

Business Skills (50%) – Training will be offered to Administrative Staff, Culinary Staff, Guest Services, General Support Staff, Housekeeping Staff, Food and Beverage/Banquet Staff, and Managers/Supervisors. Course topics include Communication & Interpersonal Skills, Customer-Focused Selling, Guest Service Skills, Hospitality Skills, Negotiating Skills, and Omni Business Processes. Omni will continue to provide its proprietary customer service training programs such as “The Omni Way” in order to identify and meet/exceed guest needs and how to provide superior guest service across all Omni facilities.

Further, Housekeeping Staff will receive “The Power of One” training to allow workers to assess and resolve guest problems by using critical thinking techniques to increase customer satisfaction. Training in Identifying/Meeting Guest Needs will also be provided to Food and Beverage/Banquet Staff to be able to identify customers' eating trends and patterns to make recommendations and exceed customer satisfaction.

Commercial Skills (5%) – Training will be provided to Engineers, Maintenance Staff, General Support Staff, and Managers/Supervisors. Training in facilities maintenance procedures, maintenance and repairs, golf course repair procedures, and irrigation skills will allow trainees to learn how to maintain/repair advanced technical equipment as well as improve the quality of facilities.

Computer Skills (25%) – Training will be offered to Administrative Staff, Guest Services, Food and Beverage/Banquet Staff, General Support, and Managers/Supervisors as it pertains to their job duties. Course topics include application skills in Omni Computer and Mobile, Internal Customer, Point of Sale, Scheduling Software, Reservation Systems, Smartphone Technology, and Tablet Technology. Training will allow workers to effectively utilize applications to assist in hotel guest registrations, searching information, and suggest activities or places to visit. Trainees will also learn to interact with customers through mobile, social media, and online channels to allow for improved personalization.

Continuous Improvement (20%) – Training will be offered to Administrative Staff, Culinary Staff, Guest Services, Engineers, Food and Beverage/Banquet Staff, Housekeeping Staff, and Maintenance Staff. Training topics include Problem Solving and Resolution, Kaizen Events, Measuring for Success, Managing Change, Team Building Skills, and Standard Work Procedures. Training will provide workers with skills that will help improve guest ratings, customer satisfaction, and increase revenue.

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.

Omni La Costa has begun construction of an additional 14,000 square-foot meeting and ballroom space as a result of a commitment to expand and upgrade its existing facility at the Carlsbad location within the next two years. The additional space is projected to open in late 2018 and the facility has committed to hiring between 40 and 50 new employees, of which, approximately 10 (Administrative Staff, Guest Services, General Support Staff, and Manager/Supervisor) will be included in the proposed training plan (Job Number 3).

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. As a feature of this program, the Substantial Contribution requirement will be waived for Job Number 3.

Substantial Contribution

As stated above, all facilities have participated in ETP Agreements in the past. However, Omni's facility in Los Angeles (Job Number 2) is the only repeat contractor with payment earned (incumbent earnings) in excess of \$250,000 at the same location (and had a former Substantial Contribution at the 50% level) within the last five years (see Prior Project Table). In the prior Omni Los Angeles proposal, ETP staff recommended the 30% floor Substantial Contribution; however, at the Panel Meeting, Panel members elected to apply the 50% ceiling Substantial Contribution. Accordingly, reimbursement for trainees at this facility will again be reduced by a 50% Substantial Contribution, in accordance to the current ETP regulations, to reflect the Los Angeles facility's \$79,800 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.

Omni's annual training budget is approximately \$290,000 per facility. The Company provides ongoing mandatory training in new-hire orientation, OSHA-mandated safety, sexual harassment prevention, first aid, as well as on-the-job training.

➤ Training Infrastructure

Omni determined that having one facility as a lead ETP contract holder to manage and administer is key to a successful project. It plans to contract with an administrative subcontractor to assist with ETP project administration. Omni La Costa has dedicated its management team to manage the ETP project for all participating facilities. La Costa's Area Director of Human Resources will partner with the Training Manager to oversee and implement ETP training. The Training Manager is also tasked with collecting attendance rosters and an administrative coordinator from each facility has been assigned to evaluate training data for accuracy as well as assist in sorting, filing, and submitting a copy of the rosters to the third-party administrator and sending the original to be centrally maintained at the Carlsbad facility.

Modification

Full-time Employment

Company representatives report that the hospitality industry typically has employees who work various hours during the week dependent upon customer demands. At Omni, a full-time Food and Beverage/Banquet Staff is regularly scheduled to work between 30 and 50 hours each week. Although most employees will work an average of 35 hours a week, it is possible that a few number of full-time staff will work an average of 30 hours a week in one quarter.

For benefits eligibility purposes, these full-time workers are eligible to receive or earn any benefits and/or other company-provided benefits program. Omni's 30-hour work week constitutes full-time employment because it is customary for the industry and occupation. As such, Omni requests a waiver to reduce the ETP standard full-time employment requirement from 35 hours per week to 30 hours per week to accommodate the 120 Food/Beverage Staff (Job Number 2) included in the proposed training plan. Omni confirms that all trainees funded in this Agreement are full-time, permanent employees, a few of which, have flexible work schedules with at least 30 hours a week.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
*ET15-0207	Carlsbad, San Diego, San Francisco, and Rancho Mirage	8/1/14 – 7/31/16	\$420,800	\$92,506 (22%)

***ET15-0207:** According to Omni La Costa representatives, during the term of this Agreement the Company experienced significant personnel changes in its human resources department and at the Executive Staff level which affected the overall implementation and management of the ETP project. Specifically, there were five personnel changes in the Director of Human Resources position during the term of the ETP Agreement, which pulled resources away from the Training Department consequently affecting the Facility's ability to schedule and conduct ETP training.

Omni La Costa hired and placed a new Human Resources management team during the latter part of the ET15 project. During this time, although the Area Director of Human Resources and the Training Manager were able to gain focus and commitment to the ETP project, they did not have sufficient time to perform enough to maximize its earnings within the contract term despite the inclusion of the other three facilities late in the Agreement. In this proposed project, the same management team continued this commitment beginning with assessment of training needs for all facilities through the development of this proposal. The team is fully committed to full implementation and delivery of the training plan within the term and earn 100% of the proposed funding in the new project.

Accordingly, the funding for incumbent trainees working at Omni facilities located in Carlsbad, San Diego, San Francisco, and Rancho Mirage has been right-sized to \$92,250 (as reflected in Job Number 1) to more closely mirror earnings in its prior Agreement (\$92,506). Further, the proposed training plan is conservative based on its training planned at 15 weighted average hours, per trainee.

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
*ET14-0230	Los Angeles	12/20/13 – 12/19/15	\$305,000	\$157,078 (52%)
ET12-0227	Los Angeles	12/19/11 – 12/18/13	\$340,782	\$301,847 (89%)

***ET14-0230:** According to Omni Los Angeles representatives, the primary factor behind the prior performance was due to the 50% Substantial Contribution (SC) assessed by the Panel. During development, the proposal applied a 30% SC; however, when the project was presented to the Panel, the members voted to increase the SC from 30% to 50%. Consequently, adjustment was made on the Substantial Contribution reduction, but the number of hours proposed in the training plan did not change. In the end, Omni Los Angeles was able to deliver approximately 20,000 hours which would have been the equivalent of \$212,882 (70%) with the 30% Substantial Contribution.

In this project, Omni Los Angeles provided training needs of 54 weighted average hours of training for its trainees. Based on this assessment, the Facility requested a funding of \$153,900, an amount no more than what was earned in the ET14 project (\$157,078). Field staff imposed a much more conservative approach in determining the funding for the Los Angeles facility and further reduced the weighted average hours from 54 to 28 to ensure success in the new project. This proposal is once again subject to a 50% SC, as such, the funding amount for the Los Angeles facility is \$79,800 (as reflected in Job Number 2). The Facility is committed to delivering the training plan within the training period of the term to earn 100% of the funds under this project.

DEVELOPMENT SERVICES

Omni La Costa retained National Training Company, Inc. (NTC) in Irvine to assist with development of this proposal for a flat fee of \$15,000.

ADMINISTRATIVE SERVICES

NTC 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

- Communication & Interpersonal Skills
- Customer-Focused Selling
- Dealing with Difficult People
- Client Data Procedures
- Guest Service Skills
- Hospitality Skills
- Identifying/Meeting Guest Needs
- Negotiating Skills
- New Service Concepts
- Omni Business Processes
- Putting the Guest First
- Service Values
- The Power of One

COMMERCIAL SKILLS

- Facilities Maintenance Procedures
- Maintenance and Repairs
- Golf Course Repair Procedures
- Irrigation Skills

COMPUTER SKILLS

- Omni Computer Application Skills
- Omni Mobile Application Skills
- Customer Information Systems
- Internal Customer Applications
- MS Office (Intermediate and Advanced)
- Point of Sale Applications
- Reservation Systems
- Scheduling Software
- Internet Marketing Systems
- Smartphone Technology and Application Skills
- Tablet Technology and Application Skills

CONTINUOUS IMPROVEMENT

- Motivation and Engagement Skills
- Problem Solving and Resolution
- Kaizen Events
- Measuring for Success
- Managing Change
- Team Building Skills
- Standard Work Procedures

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



TRAINING PROPOSAL FOR
SchoolsFirst Federal Credit Union
17-0586

Panel Meeting Date: 10/27/2017
Regional Office: San Diego Regional Office
Analyst Name: Kellen Hernandez
Type of Proposal: Single Employer
Funding Source: SET

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$ 333,000.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 333,000.00	N/A	\$ 0.00	\$ 750,000.00

APPLICANT PROFILE

Company Summary	SchoolsFirst Federal Credit Union (SFCU), is a financial cooperative for school employees-from teachers, administrators, support staff and their families.		
Industry Sector(s)	Finance & Insurance		
Priority Industry	No		
No. of Employees (Applicant)	State: 1653	US: 1662	World Wide: 1662
Turnover Rate (Applicant)	1.00 %		
Repeat Contractor	No		
High Unemployment Area	Yes		

Unions	None
---------------	------

TRAINING PROFILE

Training Objective	SFCU's training will focus on new software related to consumer loan processing (auto loans and credit cards), product knowledge training on products and services and training on new or updated regulatory requirements for financial institutions. Training will equip staff with the skills necessary to execute SFCU's business initiatives and improve company-wide efficiencies.
---------------------------	--

Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	1480	\$ 15.00	15	\$ 225	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 1934, SFCU is headquartered in Santa Ana, with three administrative offices and 46 branches located throughout Los Angeles, Orange, Riverside, San Bernardino and San Diego Counties. SFCU currently serves approximately 731,500 members and manages \$13 billion in assets. Products and services include: savings accounts, checking accounts, auto loans, credit cards, home loans, investment services, insurance services, retirement accounts, financial advice, and electronic banking services. However, the home loan operations/functions are not included in this training proposal.

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>SFCU is striving to become the primary financial institution for all of its customers. To accomplish this, the Company must educate customers of its ability to be a full-service financial institution.</p> <p>One of SFCU's main business needs is to increase its customers' participation in its consumer loan products (auto loans and credit cards). As such, SFCU is investing in new consumer loan software: Temenos. This software will provide a streamlined application, underwriting, and funding process. SFCU staff will receive training on how to complete auto loan and credit card applications, and other procedures using the new banking software.</p> <p>Staff will also be trained in new regulatory requirements for financial institutions.</p> <p>Training in this project will not include mortgage banking operations, loan products, regulations or any other aspects of mortgage banking.</p>
Training Infrastructure and Administrative Plan	<p>SFCU has assigned an in-house project administrator or Learning System Specialist (LSS). The Company plans to hire a Learning Coordinator (LC) to ensure all training information is documented and tracked correctly.</p>
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution	N/A

PROPOSED TRAINING PROJECT DETAILS

Description	
-------------	--

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations will receive training applicable to their job functions in Business, Continuous Improvement, and Management Skills topics listed under Attachment 2.	

Delivery Method/Level	E-Learning - Computer Based Training (CBT)
Summary	
Trainees will receive E-Learning CBT training in Continuous Improvement, Business, and Computer Skills topics.	

Delivery Method/Level	E-Learning - Instructor Led/Distance Learning
Summary	
Trainees will receive E-Learning (Distance Learning) in Business Skills and Continuous Improvement skills.	

4. Additional Company or Training Project Details

SFCU has requested to utilize electronic recordkeeping. ETP staff has reviewed and approved the Company's learning management system (LMS).

4.1 Program Waivers

No waivers have been requested.

4.2 Subcontractor Summary

The applicant has not retained the services of a subcontractor, to date.

4.3 Previous ETP Project Summary

The applicant has no previous ETP Contracts.

4.4 Supporting Panel Proposal Documentation

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

Attachment 1 - Group and Job Title Details

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

Group # 1: Retrainee			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
Los Angeles County - 11300 Firestone Blvd, Norwalk (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Los Angeles County - 15706 Crenshaw Blvd, Gardena (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Los Angeles County - 17500 Bloomfield Ave, Cerritos (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Los Angeles County - 223 N. Jackson Street, Suite 113, Glendale (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Los Angeles County - 2409 Arlington Ave, Torrance (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Los Angeles County - 27067 McBean Pkwy, Valencia (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Los Angeles County - 332 S. California, West Covina (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Los Angeles County - 43816 15th. St. West, Lancaster (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Los Angeles County - 4725 E. 2nd Street, Long Beach (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Los Angeles County - 515 N. Grand Ave. Ste B, Walnut (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Los Angeles County - 5359 W. Centinela Ave, Los Angeles (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Los Angeles County - 555 S. Lake Ave, Pasadena (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Los Angeles County - 6501 E. Spring Street, Long Beach (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Los Angeles County - 9125 Imperial Hwy Ste A, Downey (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Los Angeles County/HUA - 1201 Rancho Vista Blv Ste A, Palmdale (ETP Required Wage: \$12.72)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Los Angeles County/HUA - 3401 W. Century Blvd, Inglewood (ETP Required Wage: \$12.72)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Orange County - (Room HTC 702/703), Irvine (ETP Required Wage: \$29.38)			

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

Attachment 1 - Group and Job Title Details

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

Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Orange County - 1040 E Bastanchury Rd, Fullerton (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Orange County - 13008 Harbor Blvd, Anaheim (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Orange County - 15222 Del Amo Ave, Tustin (ETP Required Wage: \$29.38)			
Compliance Staff	10	\$29.38 - \$56.54	\$0.00
IT Support Staff I	20	\$29.38 - \$56.54	\$0.00
IT Support Staff II	30	\$29.38 - \$56.54	\$0.00
Lending Staff I (Non-Mortgage)	10	\$29.38 - \$42.16	\$0.00
Lending Staff II (Non-Mortgage)	10	\$29.38 - \$49.09	\$0.00
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Operations Support Staff I	40	\$29.38 - \$37.69	\$0.00
Operations Support Staff II	40	\$29.38 - \$42.16	\$0.00
Orange County - 15442 Newport Ave, Tustin (ETP Required Wage: \$29.38)			
Compliance Staff	10	\$29.38 - \$56.54	\$0.00
IT Support Staff I	30	\$29.38 - \$56.54	\$0.00
IT Support Staff II	30	\$29.38 - \$56.54	\$0.00
Lending Staff I (Non-Mortgage)	10	\$29.38 - \$42.16	\$0.00
Lending Staff II (Non-Mortgage)	10	\$29.38 - \$49.09	\$0.00
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Operations Support Staff I	40	\$29.38 - \$37.69	\$0.00
Operations Support Staff II	40	\$29.38 - \$42.16	\$0.00
Orange County - 1701-A West Imperial Hwy, La Habra (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Orange County - 18651 Brookhurst Ave, Fountain Valley (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Orange County - 2115 N Broadway, Santa Ana (ETP Required Wage: \$29.38)			
Compliance Staff	10	\$29.38 - \$56.54	\$0.00
IT Support Staff I	30	\$29.38 - \$56.54	\$0.00
IT Support Staff II	30	\$29.38 - \$56.54	\$0.00
Lending Staff I (Non-Mortgage)	10	\$29.38 - \$42.16	\$0.00
Lending Staff II (Non-Mortgage)	10	\$29.38 - \$49.09	\$0.00
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Operations Support Staff I	40	\$29.38 - \$37.69	\$0.00
Operations Support Staff II	40	\$29.38 - \$42.16	\$0.00
Orange County - 2300 Harbor Blvd., Suite H-1, Costa Mesa (ETP Required Wage: \$29.38)			

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

Attachment 1 - Group and Job Title Details

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

Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Orange County - 26440 La Alameda, Mission Viejo (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Orange County - 26892 S. La Paz Road, Aliso Viejo (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Orange County - 27825-C Santa Margarita Pkwy, Mission Viejo (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Orange County - 33122 Valle Road, San Juan Capistrano (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Orange County - 377 E Chapman Ave., Placentia (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Orange County - 5305 Alton Pkwy Ste A, Irvine (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Orange County - 590 N. Euclid, Anaheim (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Orange County - 6828 Katella Ave, Cypress (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Orange County - 7251 Warner Ave Ste C, Huntington Beach (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Orange County - 800 N State College Blvd, Fullerton (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Orange County - 8152 E. Santa Ana Cyn Ste 179, Anaheim (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Riverside County - 1209 University Ave, Riverside (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Riverside County - 40428 Murrieta Hot Springs Rd, Murrieta (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Riverside County - 4204 Riverwalk Pkwy, Suite 100, Riverside (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Riverside County - 550 Hidden Valley Pkwy, Corona (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Riverside County/HUA - 12831 Moreno Beach Dr, Ste 108, Moreno Valley (ETP Required Wage: \$12.12)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
Riverside County/HUA - 561 Chaney Street - Building D, Lake Elsinore (ETP Required Wage: \$12.12)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
San Bernardino County - 13605 Bear Valley Road, Ste 102, Victorville (ETP Required Wage: \$29.38)			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

Attachment 1 - Group and Job Title Details

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

<i>San Bernardino County - 4005 Grand Ave. Ste D, Chino (ETP Required Wage: \$29.38)</i>			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
<i>San Bernardino County - 411 N. 6th Street, Redlands (ETP Required Wage: \$29.38)</i>			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
<i>San Bernardino County - 8865 Foothill Blvd., Suite 101, Rancho Cucamonga (ETP Required Wage: \$29.38)</i>			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
<i>San Bernardino County/HUA - 161 E. 40th St., San Bernardino (ETP Required Wage: \$12.12)</i>			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
<i>San Bernardino County/HUA - 16904 Main Street, Hesperia (ETP Required Wage: \$12.12)</i>			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00
<i>San Diego County - 3430 Marron Rd Suite 200, Oceanside (ETP Required Wage: \$29.38)</i>			
Member Service Representatives	20	\$29.38 - \$33.27	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

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 Writing	
	Customer Service	
	Dynamic Presentations	
	Process Improvement	
	Product Knowledge	
	Project Management	
Computer Skills (Standard)	Temenos Banking Software	
Continuous Improvement Skills	Decision Making	
Management Skills	Coaching	
	Decision Making	
	Team Building	

<i>Delivery Method /Level</i>	<i>E-Learning – Instructor Led/Distance Learning</i>	
Training Type (Level)	Planned Course Offerings	
Business Skills	Coaching	
	Conflict Resolution	
	Customer Service	
	Decision Making	
	Product Knowledge	
	Project Management	
Computer Skills (Standard)	Temenos Banking Software	
Continuous Improvement Skills	Regulatory Training	

<i>Delivery Method /Level</i>	<i>E-Learning – Computer Based Training (CBT)</i>	
Training Type (Level)	Planned Course Offerings	Standard Hours
Business Skills	Product Knowledge	12.00
	Project Management	15.00
Computer Skills	Computer Assisted Drafting	8.00
	Computer Networking	16.00
	Computer Programming Languages	16.00
	Microsoft Office Suite	5.00
Continuous Improvement Skills	Product Knowledge	12.00
	Regulatory Training	15.00



TRAINING PROPOSAL FOR

Mann Packing Co., Inc.

17-0903

Panel Meeting Date: 10/27/2017

Regional Office: San Francisco Bay Area Regional Office

Analyst Name: Luke Molinar

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: \$ 294,400.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 294,400.00	N/A	\$ 0.00	\$ 375,000.00

APPLICANT PROFILE

Company Summary	Mann Packing and its affiliates, Fresh Leaf Farms and California Fresh Farms, clean, process, mix, and package a variety of vegetables. They are the source of many of the packaged bags of cleaned, pre-cut vegetables on supermarket shelves.
------------------------	---

Industry Sector(s)	Agriculture
Priority Industry	No
No. Employees (Applicant)	State: 815 US: 815 World Wide: 815
Turnover Rate (Applicant)	10.00%
Repeat Contractor	No
High Unemployment Area	Yes
Union(s)	Food & Commercial Workers / Local 5

TRAINING PROFILE

Training Objective(s)	Mann Packing has been expanding its offered products as the Fresh-Cut Produce industry expands. Employees will be trained on new equipment and processes, and will be cross-trained to be able to adjust to customer demand.
------------------------------	--

Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	790	\$ 15.00	24	\$ 360	8 - 200
2	Job Creation – Retrainee Initiative Program, Retrainee	10	\$ 20.00	50	\$ 1000	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Mann Packing Co., Inc. (<https://www.veggiesmadeeasy.com/>) (Mann Packing), founded in 1939, has eight facilities and is headquartered in Salinas. Mann Packing offers fresh-cut and commodity vegetables for retail, wholesale, and foodservice marketplaces. Mann Packing qualifies for ETP Out-Of-State Funding, as it provides vegetables to food services and retail companies throughout North America, including Walmart and Costco.

2. Current Training Project Details

Purpose of Training	Over the last few years, Mann Packing has increased the variety of vegetables it provides. The Company began by packaging snack trays and bowls and has since developed new ways to process vegetables, such as turning them into noodles. Mann Packing is requesting funding to train and cross-train production employees on the new techniques and processes that these new products require. Mann Packing is also rolling out several new software systems to support the increased demand and product catalog, and is requesting ETP assistance in training employees on these systems.
Training Infrastructure and Administrative Plan	Training will be scheduled and tracked by the Company's Director of Human Resources, who has authority over training for all affiliates. Training will primarily be delivered by the Company's subject matter experts, and will be tracked via an approved LMS. Training information will be entered into the ETP system by the Administrative Subcontractor.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	This will be Mann Packing's first training project, therefore they are not subject to a Substantial Contribution.

3. Curriculum Summary

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
Mann Packing will deliver manufacturing skills training on Equipment Operation, Equipment Maintenance, and Good Manufacturing Practices. Mann Packing has added several new production lines for new products, and is seeking ETP assistance in training employees to properly operate these lines. The Company will also be cross-training employees on more than one position, which will give them the flexibility to adjust production based on consumer demand or availability of vegetables.	
Mann Packing will deliver continuous improvement training to all employees on Kaizen, Process	

PROPOSED TRAINING PROJECT DETAILS

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
<p>Improvement, Problem Solving, and Team Building. Employees must have a good understanding of the manufacturing process and work well in a team environment for cross-training to be successful. This training will support the manufacturing skills training and allow trainees to work more effectively.</p> <p>Mann Packing will also be delivering training to its Administrative Staff on Computer Skills such as Oracle, its Inventory Control System, and Internal Customer Applications. These trainings will be accompanied by Business Skills training on subjects such as Accounting Skills, Business Processes, and Communication Skills. Together, these trainings will allow the Company to improve order turnaround time, supply chain management, and customer service. This training will help employees get orders to customers quickly, keeping the vegetables fresh for delivery.</p> <p>Mann Packing will also provide OSHA 10/30 Certified Safety Training. Training will be provided by certified OSHA trainers, and will help the Company's employees identify hazards and work safely in the manufacturing area.</p>	

Delivery Method/Level	Productive Laboratory
Summary	
<p>Mann Packing will be delivering training on its production equipment via the Productive Lab training methodology. Trainees require hands on experience to learn how to safely and effectively operate new machinery. This training will be delivered at a 1:1 trainer-to-trainee ratio, and will be capped at 40 hours per trainee. Productive Lab training will be delivered by the Company's in-house subject matter experts. (see Justification for Productive Lab in Attachment 2)</p>	

4. Additional Company or Training Project Details

Job Creation

Mann Packing has committed to hiring 10 new employees under ETP's Job Creation program. These workers will primarily be Production Workers, and will support Mann Packing's expansion into new product lines.

PROPOSED TRAINING PROJECT DETAILS

4.1 Program Waivers

The Company requested the following waivers:

Waivers	Description
HUA Wage Waiver	Mann Packing operates in several HUA areas, and is requesting to use the lower HUA minimum wage for these facilities.

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	National Training Company, Inc.	Irvine	\$ 15,000.00
Administrative	National Training Company, Inc.	Irvine	13% of funds earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

The applicant has no previous ETP contracts.

4.4 Supporting Panel Proposal Documentation

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 1 - Group and Job Title Details

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

Group # 1: Retrainee			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
Merced County/HUA - 14510 COLLIER RD, Delhi (ETP Required Wage: \$12.12)			
Administrative Staff	12	\$14.50 - \$19.16	\$0.00
Engineer	9	\$17.00 - \$22.62	\$0.00
Lead	6	\$14.65 - \$19.55	\$0.00
Managers/Supervisors	11	\$20.95 - \$37.64	\$0.00
Production Worker	49	\$12.27 - \$25.48	\$0.00
Technical Staff	2	\$16.25 - \$19.71	\$0.00
Monterey County - 1140 Growers St., Salinas (ETP Required Wage: \$16.16)			
Administrative Staff	1	\$14.50 - \$19.26	\$1.66
Lead	1	\$14.65 - \$19.55	\$1.51
Managers/Supervisors	1	\$20.95 - \$37.64	\$0.00
Production Worker	7	\$12.27 - \$25.48	\$3.89
Monterey County - 1250 Hansen St., Salinas (ETP Required Wage: \$16.16)			
Administrative Staff	1	\$14.50 - \$19.15	\$1.66
Engineer	1	\$17.00 - \$22.62	\$0.00
Lead	1	\$14.65 - \$19.55	\$1.51
Managers/Supervisors	1	\$20.95 - \$37.64	\$0.00
Production Worker	6	\$12.27 - \$25.48	\$3.89
Monterey County - 1347 Harkins Rd., Salinas (ETP Required Wage: \$16.16)			
Lead	4	\$14.65 - \$19.55	\$1.51
Managers/Supervisors	2	\$20.95 - \$37.64	\$0.00
Production Worker	14	\$12.27 - \$25.48	\$3.89
Technical Staff	5	\$16.25 - \$19.71	\$0.00
Monterey County - 25867 ESPERANZA RD, Salinas (ETP Required Wage: \$16.16)			
Administrative Staff	1	\$14.50 - \$19.16	\$1.66
Lead	1	\$14.65 - \$19.55	\$1.51
Managers/Supervisors	1	\$20.95 - \$37.64	\$0.00
Production Worker	7	\$12.27 - \$25.48	\$3.89
Monterey County - 308 John St., Salinas (ETP Required Wage: \$16.16)			
Administrative Staff	6	\$14.50 - \$19.15	\$1.66
Engineer	7	\$17.00 - \$22.62	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

Attachment 1 - Group and Job Title Details

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

Lead	5	\$14.65 - \$19.55	\$1.51
Managers/Supervisors	6	\$20.95 - \$37.64	\$0.00
Production Worker	62	\$12.27 - \$25.48	\$3.89
Technical Staff	3	\$16.25 - \$19.71	\$0.00
Monterey County - 49 Katherine St. , Gonzales (ETP Required Wage: \$16.16)			
Administrative Staff	11	\$14.50 - \$19.15	\$1.66
Engineer	1	\$17.00 - \$22.65	\$0.00
Lead	1	\$14.65 - \$19.55	\$1.51
Managers/Supervisors	1	\$20.95 - \$37.64	\$0.00
Production Worker	14	\$12.27 - \$25.48	\$3.89
Technical Staff	1	\$16.25 - \$19.71	\$0.00
Monterey County/HUA - 1333 Schilling Place, Salinas (ETP Required Wage: \$12.12)			
Administrative Staff	15	\$14.50 - \$19.15	\$0.00
Engineer	25	\$17.00 - \$22.62	\$0.00
Lead	45	\$14.65 - \$19.55	\$0.00
Managers/Supervisors	50	\$20.95 - \$37.64	\$0.00
Production Worker	378	\$12.27 - \$25.48	\$0.00
Technical Staff	15	\$16.25 - \$19.71	\$0.00

Group#2: Retrainee/Job Creation - Retrainee Initiative Program			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
Merced County/HUA - 14510 COLLIER RD, Delhi (ETP Required Wage: \$10.50)			
Production-Job Creation	1	\$12.27 - \$22.13	\$0.00
Monterey County - 1347 Harkins Rd., Salinas (ETP Required Wage: \$13.22)			
Production-Job Creation	1	\$12.27 - \$22.13	\$0.96
Monterey County - 308 John St., Salinas (ETP Required Wage: \$13.22)			
Production-Job Creation	1	\$12.27 - \$22.13	\$0.96
Monterey County - 49 Katherine St. , Gonzales (ETP Required Wage: \$13.22)			
Administrative Staff- Job Creation	1	\$14.25 - \$19.02	\$0.00
Monterey County/HUA - 1333 Schilling Place, Salinas (ETP Required Wage: \$10.50)			
Production-Job Creation	6	\$12.27 - \$22.13	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Accounting Skills
	Business Processes
	Coaching
	Communication Skills
	Goal Setting
	Performance-Based Coaching
	Problem Solving
	Supervisor Training
	Team Building
Commercial Skills (Safety)	OSHA 10
	OSHA 30
Computer Skills (Standard)	Computerized Inventory
	Internal Customer Applications
	Microsoft Office (Advanced)
	Microsoft Office (Intermediate)
	Oracle Software Systems
Continuous Improvement Skills	Critical Thinking Skills
	Kaizen Events
	Leadership Skills
	Measuring for Success
	Problem Solving and Resolution
	Process Improvement
	Supply Chain Management
	Team Building
Manufacturing Skills (ME) (Standard)	Case Packer
	Compliance Tracking
	Control Systems
	Equipment Cross-Training
	Equipment Drive Systems
	Equipment Maintenance/Repair Skills
	Equipment Set-Up and Testing
	Food Safety
	Forklift Certification
	Good Manufacturing Practices
	Inventory & Raw Materials Training
	Labeling Systems
	Palletizer
	Safety Leadership
	Sorting Systems
	Standard Operating Procedures
	Tray Packer
	Warehouse Skills

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>Productive Laboratory</i>						
Training Type (Level)	Planned Course Offerings						
Manufacturing Skills (ME) (Standard)	Automated Packers						
	Bagging Machine						
	Dryers						
	Equipment Cross-Training						
	Equipment Fabrication						
	Equipment Redesign						
	Labeling/Handling Equipment						
	Maintaining Equipment						
	Managing Inventory						
	Modifying and Updating Equipment						
	Operating Equipment						
	Packing Equipment						
	Processing Equipment						
	Sorting Equipment						
	Troubleshooting Equipment						
	Urschel Cutters						
<i>PL Justification and Details</i>							
Explain the need for productive laboratory (PL) training	Production Workers will be cross-trained on equipment in a classroom and then learn how to run production lines. The Productive Lab will be provided when the trainee starts operating the equipment under the mentoring of an experienced operator. Productive Lab training will allow trainees to obtain important hands-on training, with a trainer fully dedicated to ensuring they are properly and safely operating the equipment.						
Describe the Equipment/Processes to be used in delivering the PL training	The production equipment to be used: Bagging machine-used to package product into bags from 6 oz up to 32 oz. Dryers-used to dry product in a spinning cycle. Urschel cutters-cuts product to specifications. In addition, maintaining, managing and troubleshooting equipment and the design and fabrication of products.						
Describe Trainer Qualifications	Trainer will be proficient in their job and will be dedicated solely to the trainees.						
Trainer to Trainee Ratios - If more than one PL class the ratios are the lowest and the highest trainer-to-trainee ratio	<table> <tr> <th>Trainer</th><th>Trainee</th></tr> <tr> <td>1</td><td>1</td></tr> <tr> <td>1</td><td>1</td></tr> </table>	Trainer	Trainee	1	1	1	1
Trainer	Trainee						
1	1						
1	1						
Ratio for One Class, or Minimum When More than One Class	1						
Ratio for Maximum Ratio When More than One Class	1						
PLT Approval	Yes						



Training Proposal for: **Finishing Trades Institute of District Council 36 Joint** **Apprenticeship Training Trust Fund**

Agreement Number: ET18-0916

Panel Meeting of: October 27, 2017

ETP Regional Office: North Hollywood

Analyst: M. Webb

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate Apprenticeship	Industry Sector(s):	Construction Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles, Orange, Riverside, San Bernardino, Imperial, Kern, Mono, Inyo, San Diego, San Luis Obispo, Santa Barbara, Ventura	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No International Union of Painters and Allied Trades, District Council 36		
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		≤20%	

FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$887,970		\$61,625 8%		\$949,595

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

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate Journeyman	Commercial Skills, Computer Skills, OSHA 10/30	75	8-200	0	\$1,717	\$26.34
				Weighted Avg: 73			
2	Retrainee Apprentice (Painter)	Commercial Skills, OSHA 10	250	8-210	0	\$2,002	\$22.04
				Weighted Avg: 144			
3	Retrainee Apprentice Veterans (Painter)	Commercial Skills, OSHA 10	25	8-210	0	\$2,002	\$22.04
				Weighted Avg: 144			
4	Retrainee Apprentice (Industrial Painter)	Commercial Skills, OSHA 10	35	8-210	0	\$2,002	\$22.04
				Weighted Avg: 144			
5	Retrainee Apprentice (Glazier)	Commercial Skills, OSHA 10	100	8-210	0	\$2,002	\$22.04
				Weighted Avg: 144			

Minimum Wage by County: SET/Priority Industry: \$22.04 per hour

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

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

Up to \$7.93 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		
Journeyman Painter	\$26.68	65
Journeyman Glazier	\$22.10	10
Job Number 2		
Apprentice Painter	\$14.11-\$21.73	250
Job Number 3 (Veterans)		
Apprentice Painter	\$14.11-\$21.73	25
Job Number 4		

Apprentice Industrial Painter	\$15.42-\$22.72	35
Job Number 5		
Apprentice Glazier	\$17.55-\$29.72	100

INTRODUCTION

The Finishing Trades Institute of District Council 36 Joint Apprenticeship Training Trust Fund (FTI) (www.dc36.org) provides training for workers represented by local unions that make up the Painters and Allied Trades District Council 36, which represents approximately 11,000 members. Prior to 2013, FTI was known as the Southern California Painting and Drywall Industries Apprenticeship Training Trust Fund. Bargaining for the signatory employers is conducted by two trade associations: Los Angeles Painting & Finishing Contractors Association, and the Western Wall & Ceiling Contractors Association.

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

PROJECT DETAILS

To remain competitive, the signatory employers need workers who are high-skilled craftsmen, with the ability to work safely and efficiently on a variety of commercial and industrial job sites. From 2014 to 2015, approximately 500 Apprentices were enrolled in the FTI program; today, enrollment has doubled to 1,000 Apprentices.

Commercial Skills training will be provided to Apprentices in the following areas: use of dry abrasive or portable centrifugal blast cleaning equipment, ability to set up, maintain, and supervise a safe working environment, use of advanced materials and systems, marine coatings, lead paint removal, and proper use of spraying systems such as airless spray, mixing, and troubleshooting.

Training under this Agreement will include Journeyman, to introduce new technologies and methodologies being utilized in the industry. The demand for specialty training for Journeyman results from new products in the marketplace. Journeyman trainees will learn how to complete specialty work such as industrial painting and coating systems, new finishes, and toxin-safe practices. Some of this work will lead to industry standard certifications upon completion. Leadership training will also be provided to increase and replace those retiring as safety superintendents and managers.

All training is delivered via class/lab. This includes an innovative Virtual Paint Training System that provides immediate and detailed feedback on spraying technique using various materials under different environmental circumstances. The trainee will hold a spray gun that shoots out a laser beam onto a large screen, instead of paint. The sensor beam is able to document the trainee's efficiency that entails the spray pattern, over all application, ounces of paint sprayed, overspray, and elapsed time.

Training Plan

Commercial Skills (90%): Training will be offered to all occupations to increase worker knowledge and capabilities in the Painting and Glazier industry. Trainees will learn new methodologies and skills being used that include blast cleaning equipment, new finishes, mixing, and commercial painting.

Computer Skills (5%): Training will be offered to Journeymen to improve usage of computer programs in the construction field.

OSHA 10/30 (5%): Training will be delivered to Journeymen and Apprentice trainees in a series of courses “bundled” by industry sector and occupation. It consists of 10 hours of classroom or CBT training for journey-level workers and 30 hours for frontline supervisors. The coursework is geared to construction work, and also manufacturing. Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

Apprenticeship Program

The Panel is authorized to fund Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). ETP funding is designed to supplement cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. Depending on the type of trade, apprenticeship programs vary in length. In this case the program is four years.

For the building trades, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by \$5, reducing the priority industry rate from \$18 to \$13 per hour. In addition, the Panel adopted a “blended rate” for Journeymen, reflecting the fact that they may be employed by a variety of contractors over the two-year term of contract ranging from large employers, to small (≤ 100 employees). This is \$22 per hour, midway between the Priority Industry standard rate (\$18) and Small Business rate (\$26).

The ETP wage for Apprentices is no less than \$22.04 per hour, tracking the Special Employment Training wage as modified for priority industries. However, the actual wages paid are shown in the Training Plan Table and contract when they exceed \$22.04, for both Apprentices and Journeymen.

Learning Management System

Staff has reviewed and approved FTI’s use of a Learning Management System for recordkeeping.

Marketing and Support Costs

Employers are notified of FTI training programs through association web sites, mailings, and presentations. Employers are also members of the joint committee that operates the Institute and assist in developing training curriculum that will meet industry needs. Although many of the participating employers have already been recruited, additional marketing will take place to complete the project and replace any Employer whose training needs have changed since the initial start of project development.

In addition, staff will work to assess and receive feedback from participating employers in an effort to improve in all training areas to ensure their program meets industry requirements to provide high quality craftsmen. Feedback collected is received from trainees, contractors, and union

representative reports. To continue recruitment, FTI requests, as staff supports, the 8% support costs.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0905	\$765,376	09/01/16-08/31/18	771	771	98

Based on ETP Systems, 48,718 reimbursable hours have been tracked for potential earnings of \$765,376 (100% of approved amount). A total of \$50,603 has been submitted in final payments for 98 trainees. Trainees remaining will complete retention and are on track to be submitted for final payment by October 2017 based on training currently committed to by employers and in progress.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0922	Commerce	02/21/15-02/20/17	\$649,650	\$597,805 (92%)
ET14-0902	Commerce	09/30/13-09/29/15	\$723,168	\$630,738 (87%)
ET12-0158	Commerce	10/06/11-10/05/13	\$93,846	\$93,846 (100%)

DEVELOPMENT SERVICES

Steve Duscha Advisories in Sacramento assisted with development for a flat fee of \$10,000.

ADMINISTRATIVE SERVICES

Steve Duscha Advisories and the Los Angeles Unified School District in Los Angeles will perform administrative services for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

N/A

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

8-200 Trainees may receive any of the following:

Journeyman Training**COMMERCIAL SKILLS****Applicator Training**

- Corrosion
- Surface Preparation
- Abrasive Materials
- Coating Materials
- Application Methods of Protective Coatings
- Process Control
- Safety

Lead Paint Removal

- Lead and Other Toxic Metals
- Regulatory Overview
- Worker Protection from Lead and Other Toxic Metals
- Compliance with Air, Soil, Water/Sediment and Dust Regulations
- Management of Solid and Hazardous Waste
- Sources of Lead Exposure
- Control of Environmental Releases
- Specifications and Site-Specific Compliance Plans
- Work Site Preparation
- Insurance and Bonding Issues
- Other Safety and Health Hazards

Abrasive Blasting

- Principles of Surface Preparation
- Primary Components of an Abrasive Blasting System
- Abrasives
- Nozzle Equipment Operations Hands-On Session
- Portable Centrifugal (Wheel) Blast Equipment Operations Hands-On Session

Spray

- Airless Spray Equipment Operational Systems
- Set-Up and planning
- Equipment Settings, Including Pressure, Fan Size, Partial Triggering
- Proper Mixing Techniques
- Proper Spray Techniques
- Troubleshooting
- Simulation Experience
- Making Adjustments
- Recognizing and Eliminating Waste of Material

- Efficiency Ratings
- Environmental Safety
- Process Control

Marine Plural Component

- Plural Component Equipment Operational Systems
- Troubleshooting
- Characteristics of Plural Component Coatings
- Use of Two-Part High Solids Epoxy
- Mixing Components
- Meeting Specifications
- Methods of Mixing: Manual, at the Gun, Before the Manifold, After the Manifold

Marine Coatings

- Elements of Marine Corrosion
- Coating Fundamentals
- Marine Coating Systems
- Antifouling Coatings
- Surface Preparation
- Coating Application
- Quality Management
- Coating Failures
- Safety and Environmental Issues

Safe Working Conditions (All training supplements required safety training)

- Foreman Responsibility
- Worker Responsibility
- Scaffolding
- Fall Protection
- Electrical Safety
- Falling Objects
- Working in Confined Spaces
- Working Around Pipelines
- Managing Safety at the Worksite

T-Lock System

- Material and Tool Selection
- Applying Coating
- Troubleshooting

Leadership Skills

- Goal Setting
- Coaching
- Motivation
- Team Building

Advanced Materials and Systems

- Paints
- Coatings
- Conventional Spray
- Reducing Overspray

Advanced Finishes

- Venetian Plaster
- Glaze
- Metallic Finishes

Welding

- Types of Welds
- Welding Theory and Practice
- Welding Machines
- Electrodes
- What makes a “Good” Weld
- Welding Technique
- Inspection
- Discontinuities
- Striking and Maintaining an Arc
- Running a Bead
- Reading the “Puddle”
- Welding in all Positions

Total Station Instrumentation

- Setting Control Points
- Taking Readings
- Calibration
- Entering and Retrieving Data
- Transferring Data to a Computer
- Comparing Structures with Plans
- Identifying Problem Areas
- Documentation
- Advanced Blueprint Reading

Construction Site Project Management

- Foreman Responsibility for Communication, Documentation & Reporting
- Worker Responsibility for Documentation & Reporting
- Emergency Response Planning

COMPUTER SKILLSBasic Computer Skills for Construction

- Operating System
- Entering Data
- Creating Reports
- Using E-Mail
- Performing Calculations

OSHA 10 (Certified OSHA Instructor)

Construction Outreach (requires 10hr completion)

- Introduction to OSHA and the OSH Act
- General Safety and Health Provisions
- Health Hazards: Hazard Communication
- Health Hazards: Hazardous Materials
- Cranes and Rigging
- Focus Four: Electrical Safety
- Struck- By and Caught in Between
- Fall Protection
- Personal Protective Equipment
- Hand and Power tools
- Scaffolds
- Stairways and Ladders

OSHA 30 (Certified OSHA Instructor)

Construction Industry (requires 10hr completion)

- Introduction to OSHA and the OSH Act
- Recordkeeping
- Basic Safety Orientation
- General Safety and Health Provisions
- Health Hazards: Hazard Communication
- Health Hazards: Hazardous Materials
- Process Safety Management
- Personal Protective Equipment
- Fire Protection
- Materials Handling and Storage
- Hand and Power Tools
- Welding and Cutting
- Focus Four - Electrical Safety
- Focus Four - Struck- By and Caught in Between Hazards
- Focus Four - Fall Protection
- Cranes and Rigging
- Motor Vehicles
- Excavations
- Concrete and Masonry Construction
- Stairways and Ladders
- Confined Spaces
- Lead Safety in the Workplace
- Use of Explosives in the Workplace
- Scaffolds

OSHA 10 (Certified OSHA Instructor)

Maritime Industry (requires completion of 10 hours)

- Introduction to OSHA and the OSH Act
- Walking and Working Surfaces
- Personal Protective Equipment
- Fall Protection/Scaffolding

- Electrical
- Confined and Enclosed Spaces
- Fire Protection
- Hazard Communication/Hazardous Materials
- Lockout/Tagout
- Respiratory Protection
- Hot Work: Welding, Burning and Cutting
- Material Handling
- Blood Borne Pathogens
- Machine Guarding
- Ergonomics and Proper Lifting

OSHA 30 (Certified OSHA Instructor)

Maritime Industry (requires completion of 30 hours)

- Introduction to OSHA and the OSH Act
- Managing Safety and Health
- Walking and Working Surfaces, including Fall Protection
- Personal Protective Equipment
- Fall Protection/Scaffolding
- Electrical
- Confined and Enclosed Spaces
- Fire Protection
- Hazard Communications/Hazardous Materials
- Lockout/Tagout
- Respiratory Protection
- Hot Work: Welding, Burning and Cutting
- Material Handling
- Blood Borne Pathogens
- Machine Guarding
- Ergonomics and Proper Lifting Techniques

Apprentice Training**COMMERCIAL SKILLS****Industrial Painting Course 1**

- Know the Basics of Industrial Painting
- Learn the Role of Regulatory Agencies in Enforcing their Standards in the Industrial Painting Trade
- Understand the Responsibilities of Employees and Employers in the Industrial Painting Trade
- Know the Prevention and, when necessary, Reporting of Sexual Harassment
- Learn the Requirements for an American Red Cross Certification in First Aid Training
- Understand the Requirements for an American Red Cross Certification in CPR
- Know the Appropriate Use and Care of Personal Protective Equipment and Devices in Industrial Painting
- Learn the Appropriate Use and Care of Specialized Respiratory Equipment for Industrial Painting

- Understand the Basic Tools Used in Industrial Painting
- Know the Appropriate Use and Care of Industrial Painting Equipment
- Understand the Materials Used for Industrial Coating
- Know how Atmospheric Conditions Affect Performance and Application
- Learn to Prepare Surfaces for Industrial Painting

Industrial Painting Course 2

- Know How to Obtain and Interpret Work Permits and Document Work Procedures in the Industrial Painting Trade
- Learn the OSHA and Center for Protection of Workers Rights Standards for Working in Confined Spaces.
- Understand the OSHA and CPWR Standards in Dealing with Hazards in Confined Spaces.
- Know How to Recognize and Reduce Confined Space Hazards as Prescribed by the LSHA and CPWR
- Learn the Appropriate Use of Personal Protective Equipment Gear in Industrial Painting.
- Understand the Methods of Fire Prevention and Practice Standby and Rescue Procedures
- Know Basic Rigging Practices
- Learn Various Types of Ropes, Cables and Hardware Used in Industrial Painting
- Understand the Practical Application of Knots, Bends and Hitches in Industrial Painting
- Know the Appropriate Use and Application of Suspended Work Platforms in Industrial Painting
- Learn the Appropriate Use of Ladders in Industrial Painting
- Understand the Types of Uses of Scaffolds in Industrial Painting
- Know the Standards and Specifications of Surface Preparation in Industrial Painting
- Learn the Appropriate Application of Primers and Coatings in Industrial Painting
- Understand the Appropriate Use of Solvents and the Cleaning Procedures for Hand and Power Tools in Industrial Painting

Industrial Painting Course 3

- Know the Health Hazards Associated with the Industrial Painting Trade
- Learn Both the Employer's and Employee's Responsibilities Pertaining to Medical Monitoring and Personal Hygiene
- Understand the Different Environmental Considerations in Industrial Painting
- Review how Atmospheric Conditions Affect Performance and Application
- Know the Personal and Environmental Protective Measures Necessary for those in Industrial Painting
- Understand the Basics of Project Planning and Preparation
- Know the Items on the Procedure Checklist
- Learn the Methods Used for Lead Testing, Chemical Testing and Air Sampling
- Understand the Lead-Based Paint Abatement Methods Used in the Interior of a Structure

- Know the Appropriate Methods of Abatement for Exterior Area and Soil Abatement
- Learn the Requirements of Industrial Large Scale Abatement
- Understand the Differences Between Pressure Washing and Hydro Blast Cleaning

Industrial Painting Course 4

- Review the Safe and Proper Use of Equipment in Industrial Coatings
- Understand the Different Environmental Considerations in Industrial Painting
- Know the Personal and Environmental Protective Measures
- Understand the Parts, Supplies and Machinery Used in Air Blast Equipment
- Know the Different Systems Used in Abrasive Blast Cleaning
- Learn the Various Types, Sizes and Configurations of Blast Machines and their Corresponding Functions and Procedures
- Know the Different Types and Applications of Metallic Coatings
- Understand the Difference Between the Three Main Categories of Non-Metallic Coatings

Industrial Painting Course 5

- Know the OSHA Regulations Pertaining to Spray Painting in the Industrial Painting Trade
- Review the Environmental and Health Impacts of the Materials, Equipment and Procedures Used in Surface Preparation and Coating Application
- Review Safety Precautions through Hands-On Exercises
- Understand the Different Types of Solvents and Thinners, Their Chemical Compositions and Interactions and their Appropriate Application in Industrial Painting
- Learn the Factors Affecting Atomization and the Four Basic forms of Atomization
- Know the Use of Compressed Air in Spray Painting
- Understand the Spray Gun as the Key Element in Conventional Material Delivery Systems
- Know the Use of Conventional Air, Airless and Electrostatic Spray Guns on Different Applications
- Understand the High Volume Low Pressure System of Atomization
- Understand the Use of High Pressure in Airless Spray Painting Systems
- Know the Operation of the Airless Spray Guns
- Know the Purpose of Plural Component Spraying
- Learn the Operation of Electrostatic Spray Painting Systems
- Know the Three Types of Wire Flame Spray Processes
- Understand the Different Coating Materials Used in Flame Spray Operations
- Learn the Use and Care of Flame Spray Equipment

Industrial Painting Course 6

- Review How Atmospheric Conditions Affect Performance and Application

- Understand the Use of Nordson Gauge
- Know the Use and Application of Fiberglass Reinforced Plastic (FRP)
- Learnt the Proper Handling of FRP
- Learn the Use of Fire Retardant Resins of Fiber Reinforced Compositions
- Understand the Effects of Curing on Polyester Resins
- Understand the Different Processing Methods of FRP
- Know the Basics of Reinforcement Practices
- Know the Basic Repairs that can be made to FRP
- Know the Uses of Epoxy as an Architectural Coating
- Learn the Composition and Use of Epoxy Polyester
- Understand the Use of Polyurethane Coatings
- Know the Use of a Taylor Profile Comparator

Industrial Painting Course 7

- Know Safe Working Practices and Eliminate Potential Hazards in Industrial Painting
- Learn the Details of Job Specifications
- Know the Standards for Use of a Profile Comparator
- Understand Industry Standards for Surface Preparation in Obtaining Bond Strength
- Know the Standards for Sprayed Metal Application
- Learn the Standards for Metalizing Spray Painting
- Understand the Industry Standards for Use of the Nordson Gauge
- Learn the Standards on Products that Deal with Atmospheric Conditions
- Understand the Standards in Dealing with the Common Coating Defects and Failures in industrial Painting

Industrial Painting Course 8

- Know the Importance of Safety Measures in the Workplace
- Learn the Role and Functions of the Foreman and how to become a Leader
- Know How to Keep Time Records, Understand How to Charge Off Labor and Materials for Jobs and Keep Accurate Accounting Records
- Know the Characteristics, Barriers and How to Overcome Barriers to Effective Communication and How to Plan, Organize and Estimate the Needs of the Job

Commercial Painting Course 1

- Know the Basics of the Painting Trade
- Learn Workplace Safety Procedures
- Understand the Prevention and, when necessary, the Reporting of Sexual Harassment
- Know the Trade Applications of Whole Numbers
- Learn the Trade Applications of Decimals and Fractions
- Understand the Trade Applications of Various Measurements and the difference between the Base-10 System and the Metric System
- Know the Appropriate Use and Care of the Basic Painting and Wall Covering Tools

- Know the Appropriate Use and Care of Residential and Commercial Painting Ladders and Scaffolds
- Understand the Materials Used for Painting
- Know How to Prepare Surfaces for Painting and Wall Covering Including Basic Taping Techniques
- Learn the Impact of Environmental Factors on the Painting Process

Commercial Painting Course 2

- Know the Importance of OSHA in the Workplace
- Review the Different Tools, Equipment and Materials Used in Painting
- Understand How Mathematical Proportions are Applied to Practical Painting Problems
- Know How to Measure for Mixing
- Learn the Principles of Color Identification in Residential and Commercial Applications
- Understand the Painting Applications of Color Harmony
- Know Color Combination Techniques
- Learn How to Achieve Artistry in Work
- Understand How to Prepare a Surface for Painting
- Know the Natural and Synthetic Finishes and Special Items
- Learn the Differences between Wood Graining Tools and Marbleizing Tools
- Understand Wood Graining and Marbleizing Technique
- Know the Impact of Environmental Factors in Faux Finishing
- Learn Faux Finishing Materials and their Uses
- Understand the Proper Use, Care and Maintenance of Faux Finishing Equipment
- Know the Basics of Customer Service and Public Relations

Commercial Painting Course 3

- Know the Importance of Safety Measures in the Workplace
- Learn the Differences between Traditional/Conventional and Modern Spray Equipment
- Understand the Painting Materials and their Use
- Know the Appropriate Use, Care and Maintenance of Equipment
- Learn the Impact of Environmental Factor on Spray Painting
- Understand Spray Painting Techniques
- Know How to Resolve Technical and Interpersonal Job Site Problems
- Review the Basics of Customer Service and Public Relations

Commercial Painting Course 4

- Review the Trade Applications of Whole Numbers
- Review the Trade Applications of Decimals and Fractions
- Review the Trade Applications of Various Measurements and the Differences between the Base 10 System and the Metric System
- Know Different Abrasive Materials and their Uses
- Learn the Proper Use, Care, and Maintenance of Abrasive and Water Blasting Equipment
- Understand the Impact of Environmental Factors on Abrasive and Water Blasting

- Know the Abrasive Blasting Techniques
- Review Job Site Problem Resolutions

Commercial Painting Course 5

- Know the Different Types, Applications Methods and Uses of Joint Compound Materials
- Learn the Appropriate Use and Care of Special Coatings Equipment
- Review the Trade Applications of Ratios and Proportions
- Review the Measurements for Mixing
- Understand the Impact of Environmental Factors on Substrates
- Know the Methods Used in Surface Preparation
- Learn How to Adhere to Manufacturer's Data during the Application and Curing of Coatings
- Understand the Hand-Rubbed Finishing Techniques
- Know the Various Methods of Surface Cleaning
- Learn the Installation of Sheets and Weld Seams to Ameron Specification

Commercial Painting Course 6

- Review the Importance of Safety Measures in the Workplace
- Review the Trade Applications of Whole Numbers
- Review the Trade Applications of Decimals and Fractions
- Review the Trade Applications of Various Measurements and the Differences between the Base 10 System and the Metric System
- Know the Basics of Drywall Construction and Finishing
- Know the Cost Calculation of Materials and Labor
- Understand the Characteristics and Appropriate Use of Wall Covering Materials
- Know the Various Wall Covering Application Techniques
- Learn the Cost Estimation of Wall Covering
- Understand How to Determine the Amount of Paint Needed in every Project
- Review Technical and Interpersonal Job Site Problem Resolutions
- Review the Basics of Customer Service and Public Relations

Commercial Painting Course 7

- Review Safe Working Practices to Eliminate Potential Hazards
- Know the Appropriate Use and Care of Respiratory Equipment Used for Painting
- Learn How to Recognize and Reduce Confined Space Hazards as Prescribed by OSHA and the Center to Protect Workers' Rights
- Understand the Different Types and Functions of Scaffolds Used in Industrial Painting
- Know the Different Types and Applications of Metallic Coatings
- Learn the Contents and Applications of OSHA 30
- Understand the Basic Information Necessary to Pursue National Association of Corrosion Engineers Certifications

Commercial Painting Course 8

- Review the Importance of Safety Measures in the Workplace
- Learn the Role and Function of the Foreman and How to become a Leader

- Know How to Keep Time Records, Understand How to Charge Off Labor and Materials for Jobs and Keep Accurate Accounting Records
- Know the Characteristics, Barriers and How to Overcome Barriers to Effective Communication and How to Plan, Organize and Estimate the Needs of the Job

Glazier Apprentice Training

- Construction Math
- Rigging and Hoisting Basics
- Hand Signals
- Scaffolding Basics
- Codes and Regulations
- Solvents and Glazing Materials
- Power Tools
- Using Transit and Leveling Instruments
- Hand Tools
- Man Lifting Devices
- Adder Use and Safety
- Glass Cutting and Fabrication
- Mirrors: Job Layout and Measurement
- Mirrors: Mounting Methods
- Plastic Glazing Material
- Glass Replacement and Putty Glazing
- Insulated and High Performance Glazing
- Security Glazing
- Spandrel and Architectural Panel Systems
- Solar Collectors and Skylights
- Art Glass
- Auto Glass
- Door and Window Accessories and Hardware
- Anodized and Painted Finishes
- Setting Blocks, Spacers, Tapes and Gaskets
- Aluminum Entrances
- Revolving Doors
- Sealants
- Structural Glazing
- Ribbon Window Systems
- Curtain Wall Layout
- Pressure Wall
- Suspended Glazing
- Architectural and Shop Drawings
- Welding

Drywall Finishing Course 1

- Know Workplace and Apprentice Responsibilities
- Learn Principles of Effective Interpersonal Skills
- Understand Workplace Safety Issues
- Know History and Organizational Structure of the Trade
- Learn the Working Relationship between Drywall Finishing and Associated Trades
- Understand the Different Types of Safe Use of Hand Tools in the Trade

Drywall Finishing Course 2

- Review and Implement Good Safety Practices
- Learn the Importance of Strong Academic Skills, Critical Think, and Problem Solving Skills in the Workplace
- Know the Different Types of Drywall Finishing Equipment
- Learn the Characteristics and Applications of Major Drywall Finishing Materials

Drywall Finishing Course 3

- Understand Program Goals and Develop Personal Skills
- Understand Principles of Effective Communication
- Understand How to Prepare a Surface for Painting and Paperhanging using Taping Compound and Tape
- Understand How to Apply Tape and Taping Compound to Drywall Joints
- Understand Specific Job Standards in Drywall Finishing Related to Fire Walls, Elevator Shafts, Garages, Stairwells, Residential, Commercial and Industrial Buildings

Drywall Finishing Course 4

- Understand Program Goals and Develop Personal Skills
- Develop and Demonstrate Basic Math Skills Required of a Drywall Finisher
- Understand How to Estimate the Cost of a Specified Job from Plans
- Understand Career Paths and Strategies for Obtaining Employment
- Understand and Adapt to Changing Technology
- Demonstrate Necessary Practical Skills of a Drywall Finisher

Drywall Finishing Course 5

- Know the Requirements for American Red Cross Certifications in First Aid and CPR
- Understand How to Read Basic Fundamentals of Blueprints and Prepare a Materials List
- Know the Procedures for Preventive Maintenance and Care for Drywall Finishing Tools and Equipment
- Learn How to Differentiate and Apply Exterior Insulation and Finish Systems
- Understand OSHA 30 Part 1

Drywall Finishing Course 6

- Understand OSHA 30 Part 2
- Learn the Role of the Supervisor
- Know the Common Elements of Human Motivation
- Learn the Art and Science of Team Building
- Understand the Effective Communication Strategies with the Crew
- Understand the Effective Features and Function of Schedules and Bar Charts
- Learn the Current Federal and State Laws that Pertain to the Construction Industry
- Know the Importance of Written Communication and Documentation
- Understand Effective Tool and Material Management Strategies
- Learn the Basics of Production Management

- Know the Features and Functions of a Contract as a Management Tool
- Know the Importance of Estimating, Cost Accounting, Budgeting, Cost Reporting, and Cost Control
- Understand How to Estimate the Cost of a Specified Job from Plans
- Review all Drywall Finisher Skills

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

Note: Reimbursement for retraining is capped at 200 total training hours per trainee in Job Number 1 and 210 total training hours in Job Number 2, regardless of the method of delivery.



Training Proposal for:
Kern Community College District
Agreement Number: ET18-0139

Panel Meeting of: October 27, 2017

ETP Regional Office: North Hollywood

Analyst: L. Vuong

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate SB <100 SET HUA Multiple Barriers New Hire	Industry Sector(s):	Aerospace and Defense Agriculture Manufacturing Transportation/Logistics Services Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Statewide	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No International Longshore and Warehouse Union (ILWU Local 30)		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	≤20%		

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
\$544,400		\$37,600 8% and 20%		\$582,000

In-Kind Contribution:	50% of Total ETP Funding Required	\$1,250,400
-----------------------	-----------------------------------	-------------

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 Skills, Computer Skills, Continuous Impr., Haz. Materials, Literacy Skills Mgmt. Skills, Mfg. Skills, OSHA 10/30	400	8-200	0	\$770	\$16.16
				Weighted Avg: 40			
2	Retrainee	Business Skills, Comm Skills, Computer Skills, Continuous Impr., Haz. Materials, Literacy Skills Mgmt. Skills, Mfg. Skills, OSHA 10/30	150	8-200	0	\$641	\$16.16
				Weighted Avg: 40			
3	Retrainee Priority Rate SB<100	Business Skills, Comm Skills, Computer Skills, Continuous Impr., Haz. Materials, Literacy Skills Mgmt. Skills, Mfg. Skills, OSHA 10/30	100	8-200	0	\$1,112	\$16.16
				Weighted Avg: 40			
4	Retrainee SB<100	Business Skills, Comm Skills, Computer Skills, Continuous Impr., Haz. Materials, Literacy Skills Mgmt. Skills, Mfg. Skills, OSHA 10/30	30	8-200	0	\$941	\$16.16
				Weighted Avg: 40			
5	Retrainee SET HUA	Business Skills, Comm Skills, Computer Skills, Continuous Impr., Haz. Materials, Literacy Skills Mgmt. Skills, Mfg. Skills, OSHA 10/30	10	8-200	0	\$641	*\$12.12
				Weighted Avg: 40			
6	Retrainee SB<100 SET HUA	Business Skills, Comm Skills, Computer Skills, Continuous Impr., Haz. Materials, Literacy Skills Mgmt. Skills, Mfg. Skills, OSHA 10/30	50	8-200	0	\$470	*\$12.12
				Weighted Avg: 20			

7	New Hire SET HUA Multiple Barriers	Business Skills, Comm Skills, Computer Skills, Continuous Impr., Haz. Materials, Literacy Skills Mgmt. Skills, Mfg. Skills, OSHA 10/30	10	8-200	0	\$851	*\$10.50
				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 (Final Payment) regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

Minimum Wage by County: Job Numbers 1-4: \$17.63 per hour for Alameda, Contra Costa, Marin, San Francisco, San Mateo and Santa Clara Counties; \$16.96 per hour for Los Angeles County; \$17.22 per hour for Orange County; \$16.72 per hour for San Diego County; \$16.46 per hour for Sacramento County; and \$16.16 per hour for all other counties.

Job Numbers 5-6 (SET/HUA): \$13.22 per hour for Alameda, Contra Costa, Marin, San Francisco, San Mateo, and Santa Clara Counties; \$12.72 per hour for Los Angeles County; \$12.92 per hour for Orange County; \$12.54 per hour for San Diego County; \$12.34 per hour for Sacramento County; and \$12.12 per hour for all other counties.

Job Number 7 (New Hire, SET-HUA with Multiple Barriers): \$11.02 per hour for Alameda, Contra Costa, Marin, San Francisco, San Mateo, and Santa Clara Counties; \$10.60 per hour for Los Angeles County; \$10.76 per hour for Orange County; \$10.50 per hour for San Diego County; \$10.50 per hour for Sacramento County; and \$10.50 per hour for all other counties.

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

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

Participating employers may use health benefits to meet the Post-Retention Wage. Health benefits will vary by participating employer.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Production Staff	\$11.50 - \$26.00	225
Shipping Staff	\$12.00 - \$26.00	25
Laborer	\$11.50 - \$25.00	55
Maintenance Staff	\$14.50 - \$35.00	65
Lead/Operator	\$14.50 - \$37.00	20
Technician/Mechanic	\$15.00 - \$35.00	140
Administrative Staff	\$11.50 - \$25.00	70
Sales Staff Level 1	\$12.50 - \$42.50	10
Sales Staff Level 2	\$42.51 - \$70.00	10
Safety Professional Level 1	\$16.50 - \$40.00	10
Safety Professional Level 2	\$40.01 - \$65.00	5
Safety Professional Level 3	\$65.01 - \$80.00	5
Engineer Level 1	\$25.50 - \$55.50	10
Engineer Level 2	\$55.51 - \$85.00	10

Engineer Level 3	\$85.01 - \$100.00	5
Engineer Level 4	\$100.01 - \$120.00	5
Supervisor Level	\$23.50 - \$50.00	20
Manager Level 1	\$30.50 - \$60.50	4
Manager Level 2	\$60.51 - \$90.50	2
Manager Level 3	\$90.51 - \$120.50	2
Manager Level 4	\$120.51 - \$150.00	2
Computer Support Staff Level 1	\$14.50 - \$40.00	20
Computer Support Staff Level 2	\$40.01 - \$65.00	10
Small Business Owner (excluding Job Numbers 1, 2, 5 & 7)	N/A	10
Production Staff, Shipping Staff, Laborer, Maintenance Staff, Lead/Operator, Technician/Mechanic, Administrative Staff, Computer Support Staff (Job Number 7)	\$11.50 - \$40.00	10

INTRODUCTION

Founded in 1968 and headquartered in Bakersfield, Kern Community College District (KCCD) (www.kccd.edu) strives to provide outstanding educational programs and services responsive to its diverse students and communities. KCCD includes Bakersfield College, Cerro Coso College, and Porterville College.

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

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

PROJECT DETAILS

This will be the eleventh Agreement between ETP and KCCD, and the fifth in the last five years. KCCD proposes to train incumbent workers of large and small participating employers in a wide variety of industries, many of which face out-of-state competition. The core group of employers represents 100% of requested funding for this proposal. The proposed training will be offered to employers statewide. The majority of training (80%) will be conducted at participating employer locations; the remainder will be conducted at KCCD facilities.

KCCD is motivated to bring new technologies and practices to a diverse workforce by allowing each participating employer to customize training. Participating employers have a need to upgrade the skill levels of their workforce in order to stay competitive and meet customer demands. ETP-funded training will provide employers the opportunity to sustain their overall competitiveness, improve productivity, and remain current in rapidly changing technologies.

KCCD is also focused on helping unemployed or underserved individuals and has been effectively providing placement services for these individuals (including job search, interview skills, resume preparation, and job fairs) for the past two and a half years. The District also works closely with One-Stop Centers, Workforce Investment Board (WIB) and the Employment Development Department (EDD), placing over 93 trainees into employment during that time period. KCCD is also determined to help underserved populations (individuals with multiple barriers and/or other vocational disadvantages) by providing education, skills training, work experience and job placement services. KCCD designed and implemented a logistic/distribution training program to providing these individuals skills related to warehouse procedures, redistribution of products, workflow, inventory control, and time management.

Union Support

Included in the core group of employers are trainees represented by International Longshore and Warehouse Union (ILWU Local 30). These trainees may not commence training until the support letter is submitted to ETP.

Training Plan

The training outlined in this proposal will be customized, based on employer needs assessments and training objectives. KCCD conducts interviews with employers, workers, and multiple training experts to maintain a comprehensive curriculum that is relevant and responsive to employer needs. In addition, participating employers are encouraged to complete course evaluations. This feedback is used by KCCD to gauge the effectiveness of training and identify how certain modules can be improved. Customized training will be delivered by KCCD faculty and other qualified instructors through Class/Lab and Video Conference methods.

This project will assist incumbent workers and unemployed individuals in entering the workforce, and improving job-related skills and opportunities for career advancement. KCCD confirms that no trainees from previous participating employers will receive duplicate training in any subject matters.

Business Skills (5%) - Training will be provided to all occupations and include communication, conflict management and business planning. The courses will teach employees how to communicate more effectively with internal and external customers.

Commercial Skills (5%) - Training will be provided to Production Staff, Shipping Staff, Laborers, Maintenance Staff, Leads/Operators, Technicians/Mechanics, Safety Professionals, Engineers, Supervisors/Managers and Small Business Owners. Training will focus on comprehension, terminology, power system services and practical techniques in maintenance equipment services and repair.

Computer Skills (20%) – Training will be provided to all occupations. Training will allow all trainees to effectively use the Company's software applications that run and support business operations, and teach them to work more efficiently and effectively in all functions.

Continuous Improvement (50%) - Training will be provided to all occupations and will equip trainees with the skills to achieve company goals through increased productivity, quality improvements, and warehouse procedures. Training is also designed to enhance teamwork, problem solving, and decision making. Lean manufacturing will improve internal processes, workflow, and waste reduction.

Hazardous Materials (2%) - Training will be provided to Production Staff, Shipping Staff, Laborers, Maintenance Staff, Leads/Operators, Technicians/Mechanics, Safety Professionals, Supervisors/Managers and Small Business Owners. Trainees will learn the proper techniques and knowledge for handling chemical and waste cleaning.

Literacy Skills (2%) - Training will be provided to Production Staff, Shipping Staff, Laborers, Maintenance Staff, Leads/Operators and Technicians/Mechanics. This training will enable employees with limited English skills to increase their speaking, listening and comprehension skills in the workplace.

Management Skills (5%) - Training will be provided to Supervisors and Managers on leadership, motivation, and strategic planning skills which will enable them to become more effective leaders in high performance workplaces.

Manufacturing Skills (10%) - Training will be provided to Production Staff, Shipping Staff, Laborers, Maintenance Staff, Leads/Operators, Technicians/Mechanics, Safety Professionals, Supervisors/Managers and Small Business Owners. Training will provide upgraded job skills with a focus on good manufacturing practices, equipment operations and overall production operations to meet growing customer demand for products and services.

Certified Safety Training

OSHA 10/30 (1%): This training is a series of courses “bundled” by industry sector and occupation. It consists of 10 hours of classroom or CBT training for journey-level workers and 30 hours for frontline supervisors. The coursework is geared toward construction work, and also manufacturing. Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA. OSHA 10 will be provided to Production Staff, Shipping Staff, Laborers, Maintenance Staff, Leads/Operators, Technicians/Mechanics, Safety Professionals, and Small Business Owners. OSHA 30 will be provided to Supervisors and Managers to ensure a safe work environment.

Substantial Contribution

KCCD serves large and small companies, some of which may have received training in prior ETP contracts. If a large participating employer has received the benefit of the training with payment earned in excess of \$250,000 within the past five years, reimbursement for trainees at the same facility will be reduced by 15% to reflect a substantial contribution to the cost of training. Funding for any employer that has previously been assessed a substantial contribution will be reduced by 30%. Small businesses with 100 or fewer full-time employees are not subject to this provision.

Commitment to Training

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

Most of the participating employers lack the resources and funding to conduct formal and structured training; and many small companies in rural areas do not have a training budget. Access to ETP funds will help these companies meet current workforce training needs, grow, and potentially create new jobs.

Special Employment Training/High Unemployment Area

Under Special Employment Training (SET), a participating employer is not required to demonstrate out-of-state competition, and trainees are not required to meet eligibility standards for retraining (Job Numbers 5-7).

➤ Multiple Barriers

Trainees in Job Number 7 (New Hire) work in an HUA and must be hard-to-serve individuals with multiple barriers to employment. Trainees will have two or more barriers to employment (e.g., mental or physical disability, limited English proficiency, limited math skills).

➤ HUA

Additionally, trainees in Job Numbers 5-7 work in a High Unemployment Areas (HUA), with unemployment exceeding the state average by at least 25%. These companies are located in Kern, Los Angeles, Riverside, San Bernardino, Fresno, and Ventura Counties (Bakersfield, Compton, Inglewood, Perris City, Hesperia City, Fresno City, and Oak View CDP).

➤ Wage Modification

For trainees in Job Numbers 5-7, the Panel may modify the ETP Standard Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. KCCD is requesting a wage modification to the SET-HUA Minimum Wage (ranging from \$12.12 to \$13.22 per hour statewide) for all trainees in Job Numbers 5 and 6; and to the SET-HUA New Hire Wage (ranging from \$10.50 to \$11.02) for all trainees in Job Number 7.

➤ Retention Modification

The Panel may also modify the retention period for the trainees in Job Number 7 from 90 consecutive days to 90 out of 120 consecutive days with up to three employers. This is allowed based on HUA guidelines. KCCD requests this retention modification for Job Number 7.

Marketing and Support Costs

KCCD works closely with regional economic development partners and industry associations. The Workplace Learning Resource Center and the 21st Century Energy Center maintain a database of companies and mail marketing materials to advertise upcoming events. Staff networks closely with past clients, using employer and employee evaluations to determine future training needs and establish ongoing, long-term relationships. Many clients expand their initial training with in-depth, customized training after participation in short-term workshops. Staff also provides outreach to new businesses using updated brochures and marketing software to reach targeted customers in its service areas.

KCCD is a strategic partner with the Kern Economic Development Council (KEDC), local Workforce Investment Boards (WIBs), and the Kern Building Trades Council (KBTC). The KEDC is a public-private partnership whose mission is to stimulate a diversified and strong economic

climate in the service area. KCCD, KEDC, local WIBs, and the union are all represented on the Council.

KCCD has four employees dedicated to marketing, recruitment, assessment, scheduling training, and ETP administration. Community colleges throughout the State have experienced cuts in funding, making ETP support costs (8%) necessary to maintain staff for this project. Without this additional funding, the District would not be able to dedicate the time and effort necessary to sustain a successful ETP project. KCCD seeks full support cost of 8% to fund extensive marketing efforts to recruit additional participating employers and assessment activities of employers. Staff believes 8% Support Costs for Job Numbers 1 to 6 and 20% Support Costs for Job Number 7 (New Hire/Multiple Barriers), are justified in this proposal for the reasons set forth above.

Trainer Qualifications

KCCD anticipates that 80% of the training will be held at employer worksites, while 20% will be center-based. Training will be provided by KCCD's in-house technical faculty and training experts at various campuses. Outside professional experts may be used only if specific technical skills are required and unavailable internally.

Tuition Reimbursement

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

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET16-0232	\$947,826	10/26/15 – 10/25/17	1114	1,225	1,225

Based on ETP Systems, 36,255 reimbursable hours have been tracked for potential earnings of \$701,125 (74% of approved amount). The Contractor projects final earnings of 80% based on 1,225 trainees that have already completed training and are on schedule to complete the required retention period by October 25, 2017.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0246	Statewide	09/02/14 to 01/01/16	\$749,221	\$677,419 (90%)
ET13-0242	Statewide	01/28/13 to 01/27/15	\$981,333	\$971,484 (99%)
ET11-0192	Statewide	04/04/11 to 04/03/13	\$103,828	\$99,767 (96%)

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

- + Effective Communication
- + Business Report Writing and Editing
- + Conflict Management
- + Workplace Diversity
- + Strategic Planning

COMMERCIAL SKILLS

- + Automotive Repair and Service
- + Heavy equipment Repair and Service
- + Construction Skills
- + Basic Electronics
- + Introduction to Electrical Control Wiring
- + Introduction to Programmable Controllers
- + Programmable Logic Control Motor Control
- + Control Ladder Logic

COMPUTER SKILLS

- + Computer Assisted Design
- + Computer Aided Manufacturing
- + Computerized Inventory
- + Database Management
- + Microsoft Suite Software Intermediate/Advanced
- + Enterprise Software
- + Web Design
- + Website Management
- + E-Commerce

CONTINUOUS IMPROVEMENT

- + Leadership for Frontline Workers
- + Statistical Process Control
- + Teambuilding
- + Production Scheduling
- + Operations and Workflow
- + Process Improvement
- + Decision Making
- + Total Quality Management
- + Time Management
- + Lean Manufacturing
- + Six Sigma
- + Kaizen/ 7S
- + ISO Auditor Training
- + Warehouse Procedures
- + Redistribution of Products

HAZARDOUS MATERIALS

- ✚ Hazardous Materials Handling
- ✚ Hazardous Chemical Cleaning
- ✚ Hazardous Waste Cleaning

OSHA 10/30 (Certified OSHA Instructor)

- ✚ OSHA 10 (Requires Completion of full 10-hour course)
- ✚ OSHA 30 (Requires Completion of full 30-hour course)

LITERACY SKILLS

- ✚ Vocational English as a Second Language
- ✚ Basic Workplace Terminology
- ✚ Introduction of Process Terminology
- ✚ Understanding Manuals and Reports
- ✚ Written Communications
- ✚ Basic Math

MANAGEMENT SKILLS (Managers and Supervisors only)

- ✚ Strategic Leadership
- ✚ Performance Management
- ✚ Performance Evaluations
- ✚ Employee Relations
- ✚ Coaching and Motivating
- ✚ Strategic Planning

MANUFACTURING SKILLS

- ✚ Production Operations
- ✚ Parts and Product Manufacturing
- ✚ Equipment Operations
- ✚ Assembly Procedures
- ✚ Inventory Control
- ✚ Manufacturing Practices
- ✚ Welding
- ✚ Computer Integrated Manufacturing (CIM) Cell
- ✚ Food Processing
- ✚ Packaging
- ✚ Computer Pneumatic Control Machine Operation
- ✚ Shop Math, Measurements, Percentages & Fractions
- ✚ Geometric Dimensions and Tolerance

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 and new hire is capped at 200 total training hours per trainee, regardless of the method of delivery.

Participating Employers in Retrainee

Contractor's Name: Kern Community College District

CCG No.: ET18-0139

Reference No: 17-0164

Page 1 of 3

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Ace Hydraulic Sales and Service Inc.

Address: 2901 Gibson Street

City, State, Zip: Bakersfield, CA 93308

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 20

Total # of full-time company employees in California: 20

Company: AEG Management Bakersfield, LLC

Address: 1001 Truxtun Avenue

City, State, Zip: Bakersfield, CA 93304

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 15

Total # of full-time company employees worldwide: 23

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

Company: Alia Corporation dba McDonald No. 6853

Address: 140 Heron Way

City, State, Zip: Merced, CA 96341

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 500

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

Company: Braun Electric Company, Inc.

Address: 3000 E. Belle Terrace

City, State, Zip: Bakersfield, CA 93307

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 70

Total # of full-time company employees worldwide: 283

Total # of full-time company employees in California: 283

Participating Employers in Retrainee

Contractor's Name: Kern Community College District

CCG No.: ET18-0139

Reference No: 17-0164

Page 2 of 3

Company: Grimmway Enterprises Inc.

Address: 14141 Di Giorgio Road

City, State, Zip: Arvin, CA 93203

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 4,001

Total # of full-time company employees in California: 3,946

Company: Kern Schools Federal Credit Union

Address: 11500 Bolthouse Drive

City, State, Zip: Bakersfield, CA 93389

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 430

Total # of full-time company employees in California: 430

Company: Nestle USA

Address: 7301 District Boulevard

City, State, Zip: Bakersfield, CA 93313

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 200

Total # of full-time company employees worldwide: 339,000

Total # of full-time company employees in California: 7,505

Company: Rio Tinto Borates

Address: 14486 Borax Road

City, State, Zip: Boron, CA 93516

Collective Bargaining Agreement(s): International Longshore and Warehouse Union Local 30

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

Total # of full-time company employees worldwide: 901

Total # of full-time company employees in California: 711

Participating Employers in Retrainee

Contractor's Name: Kern Community College District

CCG No.: ET18-0139

Reference No: 17-0164

Page 3 of 3

Company: Tasteful Selections

Address: 13003 Di Giorgio Road

City, State, Zip: Arvin, CA 93203

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 65

Total # of full-time company employees worldwide: 65

Total # of full-time company employees in California: 65

Company: The Garlic Company

Address: 18602 Zerker Road

City, State, Zip: Bakersfield, CA 93314

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 70

Total # of full-time company employees worldwide: 156

Total # of full-time company employees in California: 154

Company: WM Bolthouse Farms, Inc.

Address: 7200 East Brundage Lane

City, State, Zip: Bakersfield, CA 93307

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 2,937

Total # of full-time company employees in California: 2,130

Company: Wonderful Orchards

Address: 6801 E. Lerdo Highway

City, State, Zip: Shafter, CA 93263

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 850

Total # of full-time company employees in California: 800



Training Proposal for:

KML Enterprises Career Development, LLC dba New Horizons Learning Group

Agreement Number: ET18-0134

Panel Meeting of: October 27, 2017

ETP Regional Office: San Diego

Analyst: H. Bernard

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate SB <100 SET HUA	Industry Sector(s):	Manufacturing Technology/IT Engineering Aerospace and Defense Services Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Statewide	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	≤20%		

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
\$395,490		\$25,810 8%		\$421,300
In-Kind Contribution:	50% of Total ETP Funding Required			\$560,000

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	Business Skills Computer Skills Continuous Impr. OSHA10/30	1,100	8-200	0	\$176	\$16.16
				Weighted Avg: 11			
2	Retrainee Priority Rate	Business Skills Computer Skills Continuous Impr. OSHA10/30	960	8-200	0	\$211	\$16.16
				Weighted Avg: 11			
3	Retrainee SB<100	Business Skills Computer Skills Continuous Impr. OSHA10/30	30	8-60	0	\$282	\$16.16
				Weighted Avg: 12			
4	Retrainee SB<100 Priority Rate	Business Skills Computer Skills Continuous Impr. OSHA10/30	30	8-60	0	\$361	\$16.16
				Weighted Avg: 13			
5	Retrainee SET	Business Skills Computer Skills Continuous Impr. OSHA10/30	30	8-200	0	\$195	\$29.38
				Weighted Avg: 13			

It will be made a condition of contract that the trainees in this Job Numbers 1-4 will never be paid less than the State or local minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

Minimum Wage by County: Job Numbers 1-4: \$17.63 per hour for Alameda, Contra Costa, Marin, San Francisco, San Mateo and Santa Clara Counties; \$16.96 per hour for Los Angeles County; \$17.22 per hour for Orange County; \$16.72 per hour for San Diego County; \$16.46 per hour for Sacramento County; and \$16.16 for All Other Counties. **Job Number 5:** \$29.38 per hour Statewide.

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

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Numbers 1 - 4		
Administrative Staff	\$13.78 - \$31.27	220
Customer Service Staff	\$14.22 - \$32.20	255
Information Technology Staff	\$25.33 – \$50.40	170
Leads	\$16.09 – \$22.53	270
Manager/Supervisor	\$19.64 – \$42.94	180
Production Worker	\$13.11 – \$24.86	482
Sales Marketing Staff	\$19.32 - \$41.03	90
Technical Support Staff	\$17.68 - \$42.68	453
Job Number 5		
Administrative Staff	\$26.33 – \$31.25	5
Customer Service Staff	\$26.33 - \$31.95	5
Information Technology Staff	\$26.33 - \$47.21	10
Sales/Marketing Staff	\$26.33 – \$37.13	5
Technical Support Staff	\$26.33 – \$38.84	5

INTRODUCTION

Founded in 1982 and headquartered in Anaheim, KML Enterprises Career Development, LLC dba New Horizons Learning Group (New Horizons) (www.NHLearningGroup.com) is a private training agency that specializes in Information Technology (IT), offering a wide variety of computer-related courses. New Horizons is a Microsoft IT Academy and a Microsoft Gold Partner and provides Microsoft, Cisco, CompTIA, Corel, Adobe, and Novel courses along with Internet and Security courses.

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

New Horizons has additional training facilities in Burbank, San Diego, Gardena, San Bernardino and Sacramento. New Horizons is eligible for ETP funding as a private training agency. This is the second ETP Agreement with New Horizons, and the second in the last 5 years.

PROJECT DETAILS

This proposal will reach large and small, priority and non-priority business. Participating employers represent a variety of industries including manufacturing, aerospace, biotechnology, and service from Orange, Los Angeles, San Bernardino, Alameda and San Diego Counties. Approximately 50 percent of the proposed training will be provided at participating employer sites and the remaining training will be conducted at New Horizon facilities.

New Horizons has built strong relationships with City, County and regional economic development agencies; chambers of commerce; industry associations; community colleges and universities; workforce development boards; America's Job Centers; and hundreds of employers in California. New Horizons works with these entities to identify specific training needs and develop curricula.

In the last project, New Horizons focused its training on companies in Southern California. In August 2016, New Horizons opened a training location in Sacramento, allowing the Company to expand its reach to Northern California. As such, this project will incorporate this new center and include participating employers from across the state. The new location has 5 classrooms, 4 trainers and expects to provide 15% of training under this ETP Agreement.

New Horizons has also implemented a Center for Leadership and Development. This is a series of training session offered by New Horizons and will provide training in soft skills such as conflict resolution and management and leadership skills. Currently the training is one full day, however due to employer demand, New Horizons expects to expand the training to 2-3 days.

Core Employer Group

The core group of employers represents 80% of the requested funding. It includes seven participating employers, five of which are new to this ETP project.

Training Plan

New Horizons has found that many companies are requesting training on cybersecurity and expects to provide more training on this topic in this project. Additionally, it is working with OPI Products, Inc. which is implementing a new SAP software system and will be partnering with New Horizons to provide training to its staff. New Horizons will also be working with Gooch and Housego LLC on continuous improvement processes as the Company works to improve both design and production processes.

Business Skills (15%): Training will be offered to all occupations in business report writing, problem solving, interpersonal communication, negotiation skills and time management, financial reports, sales and marketing skills, and customer service. Trainees will also learn financial analysis skills and project management skills.

Computer Skills (50%): Training will be offered to all occupations to help employers expand their computer infrastructures and help improve internal and external communications through computer learning. Training on Adobe Software, MS Office, Office 365, SharePoint, Visio, and Photoshop will give employees the ability to communicate more effectively within their company and with customers. Information Technology Staff will receive training on Cisco and Citrix Networks, database systems, Microsoft Exchange, hacking, HTML, implementing and supporting Windows, Novel Networks, Red Hat, Security Systems, SQL Server, and web programming/applications. This training will give IT staff the tools needed to support the computer infrastructure of their companies.

Continuous Improvement (30%): Training will be offered to all occupations to help workers streamline operations, improve communication, streamline workflow, improve productivity, implement quality measures, increase internal and external coordination for production areas. Trainees will be encouraged to identify and utilize problem-solving techniques and process improvement skills to make decisions and implement solutions to reduce or eliminate waste. Trainees will also learn Six Sigma Lean skills and leadership skills.

OSHA 10/30 (5%): Leads and Managers/Supervisors will receive training in OSHA 30 and production workers will receive training in OSHA 10. This training is a series of courses "bundled"

by industry sector and occupation. It consists of 10 hours of classroom or CBT training for journey-level workers 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.

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. Company-provided internal training activities vary widely among participating employers. Training within small companies is narrowly focused on job-specific skills and conducted on an “as needed” basis in an informal setting. These employers lack the budget and manpower to undertake more in-depth programs. Training programs provided by larger companies are more robust; however, they lack the expertise to evaluate their training programs. Training and evaluation services provided by New Horizons will allow participating employers to train their employees without having to utilize too many resources.

➤ Training Infrastructure

The VP and General Manager of New Horizons will take responsibility for oversight of this project. Account Executives from each New Horizons branch will take responsibility for marketing and recruitment of employers and conducting training needs assessments. A Training Coordinator will be responsible for scheduling training and gathering attendance rosters. Additionally, a subcontractor will perform specific ETP project administration including enrolling and tracking trainees in ETP systems.

Impact/Outcome

New Horizons assists companies as they prepare for certifications and some courses may allow trainees to obtain ISO and OSHA 10/30 certifications. Trainees may also obtain software application certifications.

Marketing and Support Costs

New Horizons has over 40 Account Executives on staff who market, recruit and conduct training needs assessments with participating employers. New Horizons surveys companies to identify key training needs and conducts face-to-face visits at employer sites to identify goals, design improvement projects, and create training plans. Once training is completed, New Horizons surveys trainees on the training content and instructors to ensure that the sessions are meeting business needs. In addition, the Account Executives follow up with the participating employer via telephone to receive feedback on training.

New Horizons requests 8% support costs for employer assessments, training needs assessments, creating actions plans, customizing training programs, and conducting employer recruitment. It will ensure that all participating employers are committed to training, and will invest the time needed to design well-developed training plans so that goals are achieved and training is delivered on-time. Staff recommends the 8% support costs.

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. Trainees in Job Number 5 will be funded under SET.

High Unemployment Area

Some participating employers may be located in an HUA with unemployment exceeding the State average by at least 25%. However, New Horizons is not asking for a wage or retention modification.

Trainer Qualifications

All training will be delivered by New Horizons internal staff. Most trainers have at least 10 years of experience in their area of expertise.

Training Agency Certification

Training agency eligibility requires certification by an independent third-party, as required for the type of school and course of study. Most schools must also be licensed by the Bureau of Private Postsecondary Education (BPPE), created in statute effective January 1, 2010.

In keeping with the Panel's standards, New Horizons is eligible as a training agency based on the following:

- BPPE licensure valid until May 18, 2020

Tuition Reimbursement

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

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

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

Agreement No.	Approved Amount	Term	No. Trainees Enrolled	No. Completed Training	No. Retained
ET16-0342	\$325,860	2/1/16– 1/31/18	640	302	300

Based on ETP Systems, 11,627 reimbursable hours have been tracked for 634 trainees for potential earnings of \$246,403 (70% of approved amount). Currently, New Horizons has placed 300 trainees for approved earnings of \$139,977. All training under ET16-0342 will be completed by 10/31/17 and once all final payments have been processed, the Contractor projects final earnings of 93% (\$303,049) based on training currently committed to by employers and in progress.

DEVELOPMENT SERVICES

New Horizons retained National Training Company, Inc. (NTC) in Irvine to assist with development of this proposal for a flat fee of \$15,000.

ADMINISTRATIVE SERVICES

NTC will also perform administrative services in connection with this proposal for an amount not to exceed 13% of payment earned.

Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 200

Trainees may receive any of the following:

BUSINESS SKILLS

- Accounting Processes
- Blueprint Reading
- Business and Report Writing
- Business Problem Solving
- Business Processes
- Change Management
- Coaching
- Conflict Management
- Customer Service Skills
- Effective Meeting Skills
- Financial Analysis Skills
- Interpersonal Communication Skills
- Marketing Strategies
- Motivating Your Employees
- Negotiation Skills
- Organizational Skills
- Product Knowledge
- Project Management
- Sales Skills
- Team Building
- Time Management

CONTINUOUS IMPROVEMENT

- Auditor Procedures
- Lean Processes
- Leadership Skills
- Problem Solving/Team Problem Solving
- Process Improvement Training
- Quality Control Systems
- Six Sigma
- Total Quality Management Skills
- Value Added Activities
- Value Stream Mapping
- Waste Identification

COMPUTER SKILLS

- Adobe Software
- Advanced Desktop Applications
- Cisco Networks
- Citrix Networks
- CompTIA Applications
- Computerized Status
- Crystal Reports
- Database Developer Tools and Utilities

- E-Business Solutions
- Enterprise and Manufacturing Management Systems
- Exchange
- Extendable Markup Language
- Hacking
- Hypertext Markup Language
- Illustrator
- Implementing and Supporting Windows
- InDesign
- Information Technology Solutions/Internet Tools
- Inventory Management Software
- IT Infrastructure Library (ITIL)
- Java Programming/Applications
- Microsoft Dynamics
- MS Office (Intermediate and Advanced)
- MS Win Server
- NET Programming/Applications
- Network Developer Tools and Utilities
- Network+
- Networking
- Novell Networks
- Paperless Systems
- Photoshop
- Project Management Applications
- Red Hat
- Scripting
- Security Systems
- Sharepoint
- Software Analysis, Design, and Implementation
- SQL Server
- Visio
- Visual Basic
- Visual Studio
- VMWare
- Web Programming/Applications
- Windows Server Support and Maintenance

OSHA 10/30)

- OSHA 10
- OSHA 30

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

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



Training Proposal for:
**Sheet Metal & Air Conditioning Apprenticeship &
 Journeymen Joint Training Fund of San Diego**

Agreement Number: ET18-0917

Panel Meeting of: October 27, 2017

ETP Regional Office: San Diego

Analyst: K. Hernandez

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee Apprenticeship Veterans	Industry Sector(s):	Construction Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Diego, Imperial	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Sheet Metal Workers' International Local 206		
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		N/A	

FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$285,000		\$19,710 8%		\$304,710

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

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate Journeyman	Comm'l Skills, Computer Skills, OSHA 10/30	30	8-200	0	\$705	\$36.63
				Weighted Avg: 30			
2	Retrainee Apprentice	Comm'l Skills, OSHA 10/30	95	8-210	0	\$2,780	\$22.04
				Weighted Avg: 200			
3	Retrainee Apprentice Veterans	Comm'l Skills, OSHA 10/30	7	8-210	0	\$2,780	\$22.04
				Weighted Avg: 200			

Minimum Wage by County: SET Priority Industry: \$22.04 per hour.

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

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

Up to \$1.39 per hour may be used to meet the Post-Retention Wage for Job Numbers 2 & 3.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Journeyman Sheet Metal Worker	\$36.63	30
Job Number 2 (Apprentice)		
Apprentice Sheet Metal Worker	\$20.65-\$30.72	95
Job Number 3 (Veteran/Apprentice)		
Veteran Apprentice Sheet Metal Worker	\$20.65-\$30.72	7

INTRODUCTION

Established in 1941, the Sheet Metal & Air Conditioning Apprenticeship & Journeymen Joint Training Fund of San Diego (SMJTF) (www.smjatc.org) is a joint effort by the Sheet Metal Workers' International Local 206 and the Sheet Metal and Air Conditioning Contractors National Association. Their mission is to provide up-to-date industry skills training and secure high-quality job opportunities for its members as negotiated through collective bargaining.

Located in San Diego, the SMJTF training center has a total of seven classrooms and labs; a computer center with 20 stations; and a welding shop with 16 welding booths. All training under

this Agreement will be center based. SMJTF currently serves 111 Apprentices and 450 Journeymen within San Diego and Imperial Counties.

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

PROJECT DETAILS

This is SMJTF's the fifth ETP Agreement, and the third in five years. This will be the second time Veterans have been introduced as a distinct cohort of Apprentice trainees.

Apprenticeship Program

The Panel is authorized to fund Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). The Panel adopted the Apprenticeship Training Program as a pilot in March 2012. It is designed to supplement cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. Depending on the type of trade, apprenticeship programs vary in length. In this case the program is five years.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by \$5, reducing the priority industry rate from \$18 to \$13 per hour. In addition, the Panel adopted a "blended rate" for Journeymen, reflecting the fact that they may be employed by a variety of contractors over the two-year term of contract ranging from large employers, to small (≤ 100 employees). This is \$22 per hour, midway between the Priority Industry standard rate (\$18) and Small Business rate (\$26).

The ETP wage for Apprentices is no less than \$22.04 per hour, tracking the Special Employment Training wage as modified for priority industries.

Veterans Program

SMJTF has committed to training seven Veterans (Job Number 3) at the regular apprenticeship reimbursement rate. For purposes of Veteran recruitment, SMJTF training programs are registered with Helmets to Hardhats. Additionally, they work with Veterans Village of San Diego and a myriad of locally based non-profit organizations that serve Veterans.

Employer Demand

The local hiring demands in San Diego and Imperial counties were considered for this funding request. Employers report the need to implement cost saving measures; a reduction in waste due to rework and delays; implementation of new state energy efficient standards; implementation of new green/clean technologies; and new skills needed due to aggressive non-union competition. Additionally, there has been a substantial need for training in three-dimensional and virtual-building modeling.

According to SMJTF there has been an increase in new Public Works Projects in the San Diego area. They include: Sweetwater Unified High School District facility, San Diego County Operations Center Crime Lab building, Sharp Medical Office facility, University of California San Diego

building, U.S. Navy Coronado Navy Seal Training Center, Southwestern College building, Ball Park Village East and San Ysidro International Border Crossing/Port of Entry. These projects are each expected to employ from 10 to 80 Sheet Metal Workers.

Curriculum Development

Employers submit program needs to all the SMJTF training centers, which receive additional union input at labor/management and industry meetings. Curriculum development is further customized for local area employers, and employer members are involved in journeyman, pre-apprentice, and apprenticeship training plan design. Training topics are customized to include new equipment and to meet new industry standards/materials.

The SMJTF has two full-time and four part-time trainers who assist with training. The trainers are former or current members of the trade and experts in the subject matter.

Training Plan

Commercial Skills (85% for Journeyman/90% for Apprentice): Courses will include Pattern Development in which trainees learn to draw, calculate mathematic configurations, fabricate, and install products out of a piece of flat metal. There will also be courses on the Plans and Specifications of mechanical, architectural, structural and electrical drawings and how to accurately read these documents to ensure that work is completed to specifications required. Training will also focus on welding and installation practices, HVAC systems, and new green technologies required by employers.

In this proposal, SMJTF will expand its Journeyman training to include Sheet Metal/HVAC Detailing, Revit Detailing Software, Bluebeam Software, Infectious Control Risk Assessment, Trimble GPS Layout, and Duct Cleaning classes. These new classes are needed by the employers so that the trainees can learn the latest software, practice and procedures as well as new methodologies in the Industry. These new skills will keep the trainees more employable in the construction industry.

Computer Skills (5% for Journeymen): Training will include 3-Dimensional (3-D) virtual construction software. There are still not enough workers who are able to use 3-D modeling. The SMJTF reports that if this training need is not met the trend to send 3-D modeling offshore will continue. Additional training in software applications will provide trainees with the ability to schedule, plan, and track jobs; meet lean construction project requirements; and install and adjust automated systems.

Certified Safety Training

OSHA 10/30: (10% for Journeyman/10% for Apprentice): This training is a series of courses “bundled” by industry sector and occupation. Completion of the training results in a certificate that expands employment opportunities. Typically, OSHA training is delivered to workers in the building trades. It consists of 10 hours for OSHA 10 and 30 hours for OSHA 30. In the past OSHA 30 was offered only to journey level workers, but today this is not the case. This training is not required as a condition of doing business in California. Yet more insurance companies are requiring employers to offer OSHA 30 to their employees, both journey level and apprentice level workers. Note: To ensure that each trainee receives certification, ETP will only consider payment earned upon completion of the full 10-hour or 30- hour 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.

Impact/Outcome

Certifications that may be earned through the training delivered in this project include: Testing and Adjusting and Balancing, Mechanical Acceptance Testing Technician, Hoisting, Rigging, Forklift, Aerial Lifts, Scaffolding, Safety, OSHA 10/30, welding and fall protection.

Commitment to Training

ETP funding will not displace SMJTF's financial commitment to training. Employers will continue to make contributions to the training trust for every hour worked by Apprentices, Pre-Apprentices, and Journeymen. In addition, SMJTF anticipates that the opportunity for enhanced training made possible by ETP funds will encourage an ongoing commitment to training by employers participating in this project. Safety training is, and will continue to be, provided by the participating employers in accordance with all pertinent requirements under state and federal law.

Marketing and Support Costs

SMJTF is requesting 8% in support costs to promote training opportunities for Journeymen and Apprentices with the 34 signatory employers, 60% of which are small businesses. Support costs will also be used by the Trust in recruiting Apprentices from schools, employment centers and community organizations; and in the recruitment of Veterans.

ETP-funded training will be discussed at all labor management meetings and pertinent trade, industry, and apprenticeship events. SMJTF routinely meets with stake-holders to ensure training plans meet business needs. Marketing and training evaluations are conducted to via face-to-face meeting, email and regular contact with employers and unions.

Staff recommends the approval of the 8% support costs.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET16-0925	\$278,400	5/31/16 - 5/30/18	130	0	0

Based on ETP Systems, 16,288 reimbursable hours have been tracked for potential earnings of \$234,985 (85% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to by employers and in progress through February 2018.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0906	San Diego	7/28/14 - 7/27/16	\$248,721	\$248,721 (100%)

DEVELOPMENT SERVICES

California Labor Federation in Sacramento, in conjunction with Strategy Workplace Communications in Oakland, assisted with development of this proposal at no charge.

ADMINISTRATIVE SERVICES

Strategy Workplace Communications will perform administrative services for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

N/A

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

8-200 Job Number 1

Journeyman

Trainees may receive any of the following:

COMMERCIAL SKILLS

- Architectural & General Sheet Metal
- Beginning HVAC
- Duct Cleaning (new class)
- Energy Auditing
- EPA Certification
- Fire, Life, Safety Certification (1 & 2)
- Infectious Control Risk Assessment (new class)
- Introduction to Welding
- Mechanical Acceptance Testing Training (Title 24)
- MIG Welding (GMAW)
- Service & Start-Up
- Stick Welding (SMAW)
- TAB Certification
- TIG Welding (GTAW)
- Trimble GPS Training (new class)

COMPUTER SKILLS

- AutoCAD (Introduction, Intermediate, Advanced)
- Benchmark Certification (CAD)
- Bluebeam Software (new class)
- Building Information Modeling Software (new class)
- Revit Detailing Software (new class)
- Sheet Metal/HVAC Detailing (new class)

Apprentice**Class Lab Hours**

8-210 Job Numbers 2 & 3

Trainees may receive any of the following:

COMMERCIAL SKILLS**Core 1 (Safety/Tools)**

- Communication
- Emergency Procedures
- Field Safety
- Geometric Construction
- Hand Tools
- Hazard Communication

- Hoisting and Rigging
- Lines and Lettering
- Safety in Field Installation
- Shop Safety

Core II (Beginning Layout)

- Freehand Sketching
- Introduction to Parallel Lines
- Pictorial Drawings
- Sheet Metal and Metal Products

Core III (Advanced Layout)

- Change Ogee Offsets
- Duct Change Elbows
- Duct S Offsets
- Introduction to Triangulation
- Y Branches

Core IV (Architectural Principles)

- Additional Architectural Sheet Metal Work
- Architectural Sheet Metal Practices
- Flashings
- Introduction to Architectural Sheet Metal
- Roof Drainage Systems
- Waterproofing Roof Edges & Walls

Plans and Specifications

- Architectural Drawings
- Electrical Drawings
- Mechanical Drawings
- Sheet Metal Shop Drawings
- Specifications
- Structural Drawings
- The Contract Documents

Architectural Installation

- Advanced Roof Drainage Systems
- Advanced Sheet Metal Fabrication
- Architectural Sheet Metal Shop Drawings
- Creating Shop Details
- Installing Architectural Sheet Metal Items
- Planning Architectural Installation

HVAC I

- Air and Air Properties
- Cooling
- Duct Design

- Duct Systems
- Energy Management Systems
- Heating
- Indoor Air Quality
- Introduction to HVAC Systems
- Refrigerant Cycle
- Servicing HVAC Equipment
- Start-Up and Commissioning Systems
- Ventilation

HVAC II

- Controls
- Electricity
- Refrigerant Cycle
- Servicing HVAC Systems
- Start-Up and Commissioning Systems
- TAB Instrument Use
- TAB Work

Sheet Metal Welding

- Codes and Symbols
- GMAW Process
- GTAW Process
- Introduction to Welding
- SMAW Process
- Welding Equipment Set-Up
- Welding Equipment Safety
- Welding Safety

Foreman and Project Management Training

- Foreman Training
- Human Relations
- Introduction to Supervision
- Personnel Records
- Planning and Organizing
- Project Management
- Supervisory Training

Job Numbers 1-3**OSHA 10/30** (Certified OSHA Instructor)

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

Safety training cannot exceed 10% of total training hours for any individual trainee. This 10% safety training cap does not apply to Hazardous Materials or OSHA 10/30 training.

Note: Reimbursement for Job Number 1 training is capped at 200 total training hours per trainee. **Reimbursement for Job Number 2 & 3 Apprenticeship training is capped at 200 total training hours per trainee in Commercial Skills and 10 hours of OSHA10 for a total of 210 hours.**



AB118

**TRAINING PROPOSAL FOR
KLA-TENCOR CORPORATION
17-0530**

Panel Meeting Date: 10/27/2017

Regional Office: San Francisco Bay Area Regional Office

Analyst Name: Lily Lai

Type of Proposal: Single Employer, ARFVTP (AB118) Program

Funding Source: Alternative and Renewable Fuel and Vehicle Technology Program (ARFVTP)

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$432,000.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$432,000.00	N/A	\$0.00	\$696,000.00

APPLICANT PROFILE

Company Summary	Founded in 1997 and headquartered in Milpitas, KLA-Tencor Corporation (KLA-Tencor) designs, manufactures and markets process control and yield management solutions for the semiconductor and related nanoelectronics industries.
------------------------	---

Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 2,750	US: 3,150	World Wide: 5,900
Turnover Rate (Applicant)	8.75 %		
Repeat Contractor	Yes		
High Unemployment Area	No		

Union(s)	N/A
-----------------	-----

TRAINING PROFILE

Training Objective(s)	The overall objective is to retrain KLA-Tencor's engineering workforce in the design, development, production, maintenance and calibration of semiconductor manufacturing tools and equipment that are used in the making of computer chip sets for electric and autonomous vehicles (EVs). Timely development and training in EV product technologies are necessary to maintain the Company's competitive position.
------------------------------	--

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	320	\$18.00	75	\$1,350	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

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

2. Current Training Project Details

PROPOSED TRAINING PROJECT DETAILS

Purpose of Training	<p>In the past, semiconductor equipment makers like KLA-Tencor focused on supplying tools to produce ICs for the latest smartphones, tablets, PCs, and other consumer electronics. Today, the automotive segment outpaces these traditional IC markets. The automotive semiconductor revenue is growing at nearly twice the rate of the overall semiconductor market. Every major automotive manufacturer including GM, Ford, Hyundai; and BMW plans to release an electric autonomous vehicle by 2020. Industry experts state that today 80% of all automotive innovations depend on semiconductors. An EV can contain up to 3,500 chipsets effecting every aspect of the automotive business, including quality, costs, and supply.</p> <p>Semiconductor equipment manufacturers recognize the need for more comprehensive inspection and measurement strategies to identify and fix problems with semiconductors before they reach the automobile manufacturing floor. KLA-Tencor's future business success depends on its ability to introduce new products and solutions that successfully address changing customer requirements for advanced semiconductor technologies including EVs. A highly skilled engineering workforce in semiconductor technology will fuel the industry's innovations in EVs and autonomous driving.</p> <p>The proposed training has been designed to provide advanced technology knowledge to engineers in the design, development, manufacture, calibration and maintenance semiconductor tools and equipment used to make chipsets for electric and autonomous driving. Semiconductors enable critically important control and efficiency capabilities for a variety of vehicle systems, including safety, navigation, entertainment, battery life and performance, and engine management. EV chipset technical innovations are inherently complex, requiring long development cycles and advanced technology training for the engineering workforce.</p> <p>This will be KLA-Tencor's eighth ETP proposal, and the third in the last five years. However, this proposal is funded AB118 therefore training is completely different than those delivered under previous proposals. No trainees will receive duplicate training.</p>
----------------------------	---

PROPOSED TRAINING PROJECT DETAILS

Training Infrastructure and Administrative Plan	<p>Training will be conducted by in-house experts and vendors when needed.</p> <p>KLA-Tencor has a corporate training department with a manager, two administrative coordinators and support staff responsible for scheduling, tracking, and reporting all ETP-funded training using an approved LMS. The Company will also retain an administrative subcontractor to assist with project administration.</p>
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	Per the AB118 Guidelines: There will not be a Substantial Contribution, in recognition that this is a new funding source from prior projects.

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>Advanced Technology – This training will be offered to all occupations in AT-Manufacturing Skills. The curriculum covers all aspects for the design, development, production, maintenance and calibration of highly sophisticated semiconductor manufacturing tools and machines that support the AB118 investment goals. Courses include lithium surface physics, electromagnetic properties, nano-scale device physics and technology, and chemical-mechanical linearization.</p> <p>Computer Skills – This training will be offered to all occupations. Topics include advanced levels of computer assisted design (CAD) software, project management and personal productivity software applications and advanced manufacturing supply chain management systems. Computer skills training will help engineers better understand, measure and reduce process variation using advanced software, problem solving techniques and statistics.</p> <p>Continuous Improvement Skills – This training will be offered to all occupations. Topics include courses to better understand, measure and reduce process variation using problem solving techniques and statistics, how to reduce costs, how to become more effective team members, how to find root causes of problems and many other tools to advance its vehicle technology products and services. Customer facing engineers will also learn how to manage projects, market communications and prepare effective oral and written presentations to customers. Domestic and international business regulations relating to clean energy, including the complexity of products and business transactions, dictate that effective customer communications and order accuracy must be achieved.</p>	

PROPOSED TRAINING PROJECT DETAILS

Delivery Method/Level	E-Learning - Computer Based Training (CBT)
Summary	
Computer-Based Training will be offered to all occupations and will supplement instructor-led class/lab training. CBT is capped at 50% of total training hours, per trainee.	

4. Additional Company or Training Project Details

AT courses will be in KLA-Tencor's proprietary measurement and inspection equipment that support the AB118 investment plan including:

- 2930/3905 optical inspection systems used to detect very small defects that could cause reliability failures in EV chipsets, batteries, and other technologies.
- 8 Series/Puma laser scanning inspection systems used to inspect large areas to ensure no failures are present.
- iPAT system, a proprietary technical approach that helps manufacturers identify potential reliability failures before they leave the semiconductor fab for EV manufacturers.

Based on internal corporate budgets, the costs for delivering AT training is approximately \$3,000 per day. Trainer-to-trainee ratio will be capped at 1:10 to allow in-depth learning experience. Training will be delivered by in-house trainers who are senior Engineers with highly technical knowledge and experience.

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

KLA-Tencor has retained the services of the following Subcontractor.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Herrera & Company	Stockton	\$ 8,750.00
Administrative	Herrera & Company	Stockton	13% of payment earned
Training	None selected to date	N/A	N/A

PROPOSED TRAINING PROJECT DETAILS

4.3 Previous ETP Project Summary

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

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
ET14-0192	Santa Clara	10/28/13 – 10/27/15	\$577,879	\$555,856	96%
ET12-0127	Santa Clara	10/03/11 – 10/02/13	\$424,728	\$424,728	100%

4.4 Supporting Panel Proposal Documentation

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

Attachment 1 - Group and Job Title Details

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

Group # 1: Retrainee			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
<i>Santa Clara County - 1 TECHNOLOGY DR, Milpitas (ETP Required Wage: \$17.63)</i>			
Engineer	260	\$27.00 - \$47.00	\$0.00
Manager	20	\$29.00 - \$49.00	\$0.00
Technician	40	\$22.00 - \$44.00	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

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)	Advanced Computer Assisted Design (CAD)	
	Advanced Manufacturing Supply Chain Mgmt Systems	
	Personal Productivity Software	
	Project Management Software	
	Semiconductor Lithography Software	
	Software and Informatics Systems	
Continuous Improvement Skills	Business System Processing	
	Effective Technical Presentations	
	Process Improvement Training	
Manufacturing Skills (ME) (Advanced Technology)	Advanced Competent Inspection and Wafer Level Packaging	
	Advanced Manufacturing Lab Applications	
	Application Engineering Services	
	Automated Electrophoresis and Microfluidics	
	Chemical Mechanical Linearization	
	Data Storage Media/Head Manufacturing	
	Electromagnetic Properties	
	Front-End Defect Inspection Systems	
	In-Situ Process Monitoring	
	Instrument Modeling/Integration Software	
	Lab Automation and Robotics	
	LED Power Device and Compound Semiconductor Manufacturing	
	Lithium Surface Physics	
	Metrology	
	Microelectromechanical Systems	
	Nano-Scale Device Physics	
	Optical CD and Shape	
	Rectile Manufacturing	
	Surface Metrology: Stylus and Optical Profiling	

<i>Delivery Method /Level</i>	<i>E-Learning – Computer Based Training (CBT)</i>	
Training Type (Level)	Planned Course Offerings	Standard Hours
Business Skills	Process Improvement	2.00
	Project Management	3.00
	SAP systems	2.00



Panel Amendment #1 Proposal for:
Bay Alarm Company
Agreement Number: ET17-0190

Amendment Effective Date: July 21, 2017

Panel Meeting of: October 27, 2017

ETP Regional Office: Sacramento

Analyst: J. Dongallo

CURRENT PROJECT PROFILE

Contract Type:	Priority/Retrainee SET/HUA - Retrainee Veterans Job Creation Initiative	Industry Sector(s):	Construction Services
Counties Served:	Alameda, Contra Costa, Los Angeles, Orange, Sacramento, San Bernardino, San Diego, San Joaquin, San Mateo, Santa Clara, Shasta, Sonoma, Ventura	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:	September 6, 2016 to September 5, 2018	Substantial Contribution:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

CURRENT FUNDING

Current Funding
\$490,000

AMENDMENT FUNDING

Requested Funding	Total Funding
\$199,400	\$689,400

AMENDMENT TRAINING PLAN TABLE

Job No.	Job Description (By Contract Type)	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CB T		
1	Priority Rate SET	Business Skills, Commercial Skills, Computer Skills, Continuous Impr	50	8-200	0-20	\$1,188	\$21.28
				Weighted Avg: 66			
2	Priority Rate SET HUA	Business Skills, Commercial Skills, Computer Skills, Continuous Impr	100	8-200	0-20	\$648	*\$13.90
				Weighted Avg: 36			
3	Job Creation SET HUA Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Impr	135	8-200	0-20	\$3,600	*\$12.77
				Weighted Avg: 180			
4	Veteran Priority Rate SET HUA Job Creation	Business Skills, Commercial Skills, Computer Skills, Continuous Impr	20	8-200	0-20	\$3,960	*\$12.77
				Weighted Avg: 180			

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

Minimum Wage by County: Job Number 1: (SET/Priority Industry): \$21.28. Job Number 2: (SET/HUA): \$12.77 per hour – Sacramento County; \$11.70 per hour - San Joaquin County. Job Numbers 3 & 4: (Job Creation): \$14.19 per hour – Alameda, Contra Costa, San Mateo, and Santa Clara counties; \$13.73 per hour – Los Angeles County; \$13.76 per hour – Orange County; \$13.72 per hour – San Diego County; \$13.42 per hour – Sacramento County; \$12.77 per hour – San Bernardino, San Joaquin, Shasta, Sonoma, and Ventura counties.

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

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

Up to \$1.70 per hour may be used to meet the Post-Retention Wage in Job Numbers 1, 3-4.

Commissions have ranged from \$0.25 to \$49.17 per hour over the past 12 months, with the average hourly commission being \$12.88. Commissions may be used by Sales Staff to meet the post-retention wage requirements.

* The Company is not Retail Trade, as such, occupations paid by commissions do not fall under the Panel's "Lowest Priority" for FY

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Sales Staff	\$13.46 - \$43.46	5
Operations Staff	\$26.67 - \$49.00	5
Installer/Dispatcher	\$19.58 - \$39.38	15
Service Technician	\$27.09 - \$36.78	15

Customer Service Staff	\$26.75 - \$34.05	5
Frontline Manager	\$28.00 - \$55.00	5
Job Number 2		
Sales Staff	\$14.28 - \$43.00	20
Operations Staff	\$15.00 - \$19.25	5
Installer/Dispatcher	\$13.90 - \$23.40	25
Service Technician	\$15.75 - \$26.00	25
Customer Service Staff	\$16.00 - \$24.00	15
Frontline Manager	\$19.00 - \$26.00	10
Job Number 3-Job Creation		
Sales Staff	\$14.28 - \$43.00	20
Operations Staff	\$12.00 - \$19.00	10
Installer/Dispatcher	\$11.07 - \$23.00	40
Service Technician	\$15.75 - \$24.00	40
Customer Service Staff	\$15.90 - \$25.00	15
Frontline Manager	\$19.00 - \$26.00	10
Job Number 4-Job Creation		
Sales Staff	\$14.28 - \$43.00	2
Operations Staff	\$12.00 - \$19.25	4
Installer/Dispatcher	\$11.07 - \$23.40	4
Service Technician	\$15.75 - \$26.00	4
Customer Service Staff	\$15.90 - \$25.00	4
Frontline Manager	\$19.00 - \$43.00	2

INTRODUCTION

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

AMENDMENT DETAILS

Bay Alarm is requesting an Amendment to add additional funds to allow employees to continue training on the existing Curriculum. With constant changes and upgrades related to the industry, an extensive training program is implemented nearly every day. Job Creation Technicians and Installers in Job Numbers 3 and 4 will receive the most training. Job specific training for these employees may last up to eight weeks. Trainees in Job Number 4 needs an additional 130 hours to support the eight week training and help trainees acquire the skills necessary to meet company standards.

The Company also requests an increase in training hours for Job Number 1. These trainees work in a more competitive field, in which a better trained/skilled worker would have a higher

advantage against competition. Therefore, the Company has emphasized more training for Job Number 1 trainees.

Currently, the Company has tracked 87% of the potential earnings for Job Number 3 and approximately 246% for Job Number 4. In addition, training for the Company's incumbent staff, Job Numbers 1 and 2, also continues to flourish and has been tailored to the needs of the job functions.

Overall, the Company has delivered over 103% of the approved ETP funding to date. At the current pace of training, the Company will exhaust all its funding by the end of August 2017.

This Amendment will be made retroactive to the date of request on July 21, 2017. This will give Bay Alarm 10 months to complete training.

This Amendment will:

- Increase the weighted average from 22 to 66 and increase the cost per trainee from \$396 to \$1,188 in Job Number 1
- Increase the weighted average from 27 to 36 and increase the cost per trainee from \$486 to \$648 in Job Number 2
- Increase the weighted average from 148 to 180 and increase the cost per trainee from \$2,960 to \$3,600 in Job Number 3
- Increase the weighted average from 50 to 180 and increase the cost per trainee from \$1,100 to \$3,960 in Job Number 4
- Increase In-Kind Contribution from \$528,000 to \$813,500
- Increase Agreement amount from \$490,000 to \$689,400

RECOMMENDATION

Staff recommends approval of this Amendment.

CURRENT CONTRACT PERFORMANCE

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

Agreement No.	Approved Amount	Term	No. Trainees Enrolled	No. Completed Training	No. Retained
ET17-0190	\$490,000	09/06/2016 - 09/05/2016	353	19	19

To date, the ETP Online System shows hours tracked for 103% of the current Agreement amount. No trainee has been submitted for final payment or have reached the maximum allowable training hours.

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

8 – 200

Trainees may receive any of the following:

BUSINESS SKILLS

- Business Acumen
- Customer Service/Customer Account Skills
- Technical Sales /Contracts

COMMERCIAL SKILLS

- BayComm Network System and New Fire Panel Technology
- Digital Watchdog Technology
- Enhanced Industry Knowledge Enhanced Security Equipment
- E-waste Recycling
- Lyric System
- Multi-Camera Interactive Video Capture/Surveillance Systems
- Next Generation Cellular Communications
- Equipment Installation
- Equipment Servicing and Troubleshooting
- Residential and Commercial Systems/Applications Protocols

COMPUTER SKILLS

- ADP Human Capital System
- Advanced Microsoft Office
- Alarm and Computer System Procedures
- Bay Alarm Proprietary Software System

CONTINUOUS IMPROVEMENT

- Critical Thinking Skills
- Effective Time Management
- Goal Setting/Productivity Skills
- Process & Quality Re-engineering
- Team Effectiveness/Collaboration

CBT Hours

0 – 20

BUSINESS SKILLS

- Collection (4 hrs.)
- Effective Communication (4 hrs.)

CONTINUOUS IMPROVEMENT SKILLS

- Time Management (4 hrs.)
- Team Leadership (4 hrs.)
- Dealing with Difficult People (4 hrs.)

COMMERCIAL SKILLS

- Mobile Fire Inspection (4 hrs.)
- SharePlus Lite (SharePoint mobile access) (4 hrs.)

- PSA (Professional Services Automation) Web Application (4 hrs.)
- DVR (Digital Video Recorder) Basics (4 hours)
- Fire Panel Programming (4 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.



TRAINING PROPOSAL FOR
ALLERGY, IMMUNOLOGY & ASTHMA MEDICAL GROUP, INC.
17-0635

Delegation Order Date: 09/18/2017
Regional Office: Sacramento Regional Office
Analyst Name: Jana Lazarewicz
Type of Proposal: Single Employer (SB), Small Business Program
Funding Source: SET

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$ 33,440.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 33,440.00	N/A	\$ 0.00	\$ 28,800.00

APPLICANT PROFILE

Company Summary	Allergy, Immunology & Asthma Medical Group, Inc. (AIAMG) provides allergy skin testing and allergy shots to diagnose and treat a variety of allergic conditions such as food allergies, insect stings, hives and hay fever.		
Industry Sector(s)	Healthcare		
Priority Industry	No		
No. of Employees (Applicant)	State: 38	US: 38	World Wide: 38

Turnover Rate (Applicant)	4.00 %
Repeat Contractor	No
High Unemployment Area	Yes
Unions	None

TRAINING PROFILE

Training Objective	AIAMG needs to upgrade the skills of its workforce to keep pace with new technology and ever-changing regulatory requirements.
---------------------------	--

Training is summarized below.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	36	\$ 22.00	40	\$ 880	8 - 60
2	Job Creation – Retrainee Initiative Program	2	\$ 22.00	40	\$ 880	8 - 60

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 1980, and headquartered in Stockton, AIAMG offers specialized treatment options for patients suffering from asthma, chronic sinus infections, and allergies. This includes skin testing and injection series, to diagnose and treat a variety of conditions such as food allergies, insect stings, hives and hay fever. The Company has five facilities in California: Lodi, Manteca, San Andreas, Stockton, and Tracy.

This will be AIAMG's first ETP Agreement and training will only take place at the Stockton facility.

2. Current Training Project Details

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

Purpose of Training	<p>AIAMG must provide employees with the knowledge essential to remain in compliance with state and federal health care requirements. For example, the recent implementation of Medicare's Merit-based Incentive Payment System (MIPS) requires detailed reporting of a clinician's performance and has created a need for training among all occupations.</p> <p>Training is also needed on new equipment and software. The Company has invested \$200,000 in a NIOX machine and Rosch Visionary Systems software. The NIOX machine will assist with asthma control by measuring the amount of nitrous oxide from a patient's exhale. The Rosch Systems software will track a patient's allergy history and allergy skin testing measurements. Implementation of all new equipment is scheduled to be completed by September 2017.</p> <p>AIAMG has designed an extensive training program consisting of medical policies and procedures, along with techniques for new equipment and processes.</p>
Training Infrastructure and Administrative Plan	<p>AIAMG has designated a staff member to plan, schedule, and oversee all aspects of training. AIAMG staff will collect and review training rosters to ensure compliance with ETP record keeping guidelines. In addition, the Company has retained the services of Propel Consulting Group as an administrative subcontractor.</p>
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A

PROPOSED TRAINING PROJECT DETAILS

Substantial Contribution Description	N/A
---	-----

3. Curriculum Summary

A summary of the curriculum is shown below:

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
Business Skills: Training will be offered to all occupations to enhance soft skills and improve operations. The training will also insure that AIAMG maintains compliance when handling medical documentation. Topics will include Medical Policies and Procedures, Time Management, and Conflict Resolution.	
Commercial Skills: Training will be provided to Medical Technicians, Nursing, and Physicians occupations. Staff will learn the proper procedures for operating medical equipment.	
Computer Skills: Training will be provided to all occupations to ensure that trainees can properly use various programs required by AIAMG. Topics will include Intermediate/Advanced Microsoft Office, Medical Reporting and Tracking, and Rosch Systems Visionary.	
Literacy Skills: Training will be offered to Administration occupations in Vocational English. Training will result in an increased understanding of how to communicate clearly with staff.	

4. Additional Company or Training Project Details

Additional information relative to the proposed Training Project is shown below:

Retrainee – Job Creation

AIAMG is expanding existing business capacity to meet demand by purchasing equipment and hiring staff. AIAMG has committed to hiring two Nurses (Group Number 2) as Temporary-to-Permanent employees. To be eligible for reimbursement under this Group Number, the trainees must be hired into full-time permanent positions within the three-month period prior to Panel approval or during the term of contract.

4.1 Program Waivers

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

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

Trainees in Group Numbers 1 and 2 work in High Unemployment Areas (HUA), with unemployment exceeding the state average by 25%. The Company's location in San Joaquin County qualifies for the

PROPOSED TRAINING PROJECT DETAILS

ETP Reduced Standard Wage rather than the Standard Wage. The Panel may modify the ETP Standard Wage for these trainees by up to 25% if post-retention wages exceed the start-of-training wages.

AIAMG is requesting a 25% wage modification from \$16.16 per hour to \$12.12 per hour for 11 Medical Technicians and Administration Staff in Group Number 1.

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or %
Development	Propel Consulting Group	El Dorado Hills	\$ 2,500.00
Administrative	Propel Consulting Group	El Dorado Hills	Fee not to exceed 13% of funding earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

AIAMG does not have any prior ETP Agreements.

Attachment 1 - Group and Job Title Details

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

Group # 1: Retrainee			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
<i>San Joaquin County/HUA - 4628 GEORGETOWN PL, Stockton (ETP Required Wage: \$12.12)</i>			
Administration 1	7	\$16.16 - \$20.00	\$0.00
Administration 2	6	\$12.12 - \$16.15	\$0.00
Medical Technicians 1	3	\$16.16 - \$18.00	\$0.00
Medical Technicians 2	5	\$12.12 - \$16.15	\$0.00
Nursing	11	\$23.00 - \$30.00	\$0.00
Physicians	4	\$75.00 - \$100.00	\$0.00

Group # 2: Retrainee/Job Creation – Retrainee Initiative Program			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
<i>San Joaquin County/HUA - 4628 GEORGETOWN PL, Stockton (ETP Required Wage: \$10.50)</i>			
Nursing	2	\$20.00 - \$25.00	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

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	Conflict Resolution
	Decision Making & Problem Solving
	Leadership Skills
	Medical Policies & Procedures
	Time Management
Commercial Skills (Standard)	Medical Equipment Operation
Computer Skills (Standard)	Medical Reporting & Tracking
	Microsoft Office - Intermediate & Advanced
	Niox Machinery
	Rosch Systems Visionary
	Snom UC Edition callware
Literacy Skills	Basic English - Language
	Basic English - Written



TRAINING PROPOSAL FOR

Bokisch, Inc

17-0539

Panel Meeting Date: 10/27/2017
Delegation Order Date: 09/29/2017
Regional Office: Sacramento Regional Office
Analyst Name: Dumaurier Jordan
Type of Proposal: Single Employer
Funding Source: Out-of-State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$14,400.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$14,400.00	N/A	\$0.00	\$11,800.00

APPLICANT PROFILE

Company Summary	Bokisch, Inc. (Bokisch) (http://www.bokischvineyards.com/), is a vineyard in the Central Valley of California that manages approximately 2,500 acres of winegrapes and produces dozens of Spanish varietal wines.
------------------------	--

Industry Sector(s)	Agriculture		
Priority Industry	Yes		
No. Employees (Applicant)	State: 150	US: 150	World Wide: 150
Turnover Rate (Applicant)	17.00 %		
Repeat Contractor	No		

High Unemployment Area	Yes
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Training will focus on the development of “lead workers” throughout the organization. Leads will be trained to effectively manage their crews to improve production efficiencies.
------------------------------	---

Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	20	\$18.00	40	\$720	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

The Company was founded in 2002 and is headquartered in Clements. Bokisch is unique insofar as it is both a grower and bottler. The Company's own vineyard produces Iberian grapes for varietal wines.

The Company also bottles 11 different Iberian wines, distributed largely throughout California. The Bokisch brand has grown, leading to the opening of a second label under the name Tizona.

Training will take place at Bokisch's single location in Clements.

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>Demand for Bokisch products has increased and to meet this demand, workers must be led by effective leaders. Training will focus on time management, leadership and planning/forecasting skills.</p> <p>Lead workers will also be trained in irrigation, pesticide/chemical application, tractor use, and proper stewardship to promote mastery in their areas of expertise. These skills will then be transferred to their staff with the ultimate goal of increasing production efficiencies.</p>
Training Infrastructure and Administrative Plan	Four administrative staff and two assistant vineyard managers are dedicated to the administration of the ETP Agreement. Training will be delivered by in-house subject matter experts.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

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

PROPOSED TRAINING PROJECT DETAILS

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
Trainees will receive Class/Lab training in Commercial Skills, Hazardous Materials, Literacy Skills, and Management skills.	

4. Additional Company or Training Project Details

4.1 Program Waivers

The Company is requesting a wage waiver as shown below.

Waivers	Description
High Unemployment Area	<p>All trainees work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%. Bokisch's location in San Joaquin County qualifies for HUA status under these standards.</p> <p>For these trainees, the Panel may modify the ETP minimum wage by up to 25% if post-retention wages exceed the start-of-training wages. Bokisch is requesting a wage modification from \$16.16 to \$14.75 per hour.</p>

4.2 Subcontractor Summary

The applicant has not retained the services of a Subcontractor.

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

N/A

Attachment 1 - Group and Job Title Details

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

Group # 1: Retrainee			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
<i>San Joaquin County/HUA - 26680 N. Mackville Rd, Clements (ETP Statutory Standard: \$12.12)</i>			
Team Leaders	20	\$14.75 - \$16.00	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

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
Commercial Skills (Standard)	Equipment Operation
	Irrigation
	Viticulture
Hazardous Materials Skills	Pesticide/Chemical Application
Literacy Skills	English Comphresion
	Reading & Writing
Management Skills	Leadership
	Planning/forecasting
	Time Management



**TRAINING PROPOSAL FOR
CITADEL PREMIUM DESIGN, INC.
17-0518**

Panel Meeting Date: 10/27/2017
Delegation Order Date: 09/29/2017
Regional Office: Sacramento Regional Office
Analyst Name: Karen Mam
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: \$37,440.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$37,440.00	N/A	\$0.00	\$94,000.00

APPLICANT PROFILE

Company Summary	Citadel Premium Design, Inc. (Citadel) (http://www.citadelpremiumdesign.com) provides flooring, tile, solid surface countertops, and window covering design and installation.
------------------------	---

Industry Sector(s)	Construction		
Priority Industry	Yes		
No. Employees (Applicant)	State: 82	US: 82	World Wide: 82
Turnover Rate (Applicant)	5.00 %		
Repeat Contractor	No		

High Unemployment Area	Yes
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Training will focus on newly-hired staff who require job specific training to meet customer demands.
------------------------------	--

Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Job Creation – Retrainee Initiative Program, Retrainee	28	\$26.00	45	\$1,170	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee, Veterans Program	4	\$26.00	45	\$1,170	8 - 60

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Citadel was founded in 2009 and is located in West Sacramento. The Company provides services to commercial and residential home. Training will take place at the Company's sole location in West Sacramento. This is Citadel's first ETP Agreement.

2. Current Training Project Details

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

Purpose of Training	<p>With recent gains in the housing industry, Citadel has experienced an increase in business. The Company has doubled its revenue over the past two years, and anticipates similar continued growth in revenue and employees.</p> <p>The Company has also recently acquired new contracts/projects in residential construction. New staff must be trained on proper techniques related to flooring, granite and various tiles. Training will ensure construction regulations and standards are in compliance with all state and local government standards.</p> <p>Retrainee-Job Creation</p> <p>With the increase in demand for construction services, Citadel is expanding its workforce to meet the demands from new contracts and projects. These contracts are with new house construction companies and new staff will be retained on a continual basis. The Company is hiring Administration Staff, Field Supervisors, Installers and Helpers.</p> <p>Citadel has committed to hiring 32 new employees. Trainees must be hired within the three-month period prior to Panel approval or during the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.</p>
Training Infrastructure and Administrative Plan	Citadel has dedicated administrative staff to implement the training, and ensure trainee scheduling. The Company also retained Propel Consulting Group to assist with enrollment, tracking, and record keeping.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A

PROPOSED TRAINING PROJECT DETAILS

Substantial Contribution Description	N/A
---	-----

3. Curriculum Summary

A summary of the curriculum appears below. See *Attachment 2 - Training Delivery and Curriculum Listing* for more detail.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
Training will be delivered by in-house experts in Business, Commercial and Computer Skills.	

Delivery Method/Level	Productive Laboratory
Summary	
Citadel is requesting PL-Commercial Skills for its Field Personnel, Installers and Helpers. Equipment used during PL includes carpentry tools, caulking guns, nailers, polishers, flooring jacks, woodworkers, drills, and tools of the flooring, counter top and bathroom installation trades. The Company is requesting a trainer-to-trainee ratio of 1:2 as some materials used, such as granite, are extremely heavy and must be handled by two trainees at the same time. Trainers are subject matter experts and will train new employees and mentor these individuals to become proficient in flooring. PL is capped at 24 hours per trainee.	

4. Additional Company or Training Project Details

4.1 Program Waivers

High Unemployment Area

All trainees work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%. The Company's location in Yolo county qualify for HUA status under these standards. However, Citadel is not asking for a wage modification. Even though funding is under Special Employment Training, trainees in both Group Numbers are Job Creation and qualify for the New hire wage as shown under Funding Details.

Waivers	Description
Retention Period for Veterans	Alternate Retention Period: 500 hours within 272 consecutive days, working full-time with one or more Employers Approval Justification: veterans qualify for an alternate retention

4.2 Subcontractor Summary

The applicant has retained the services of the following Subcontractor.

PROPOSED TRAINING PROJECT DETAILS

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Propel Consulting Group	El Dorado Hills	\$3,744.00
Administrative	Propel Consulting Group	El Dorado Hills	13% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

4.4 Supporting Panel Proposal Documentation

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

Attachment 1 - Group and Job Title Details

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

Group # 1: Retrainee/Job Creation – Retrainee Initiative Program			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
<i>Yolo County/HUA - 1347 TRADEWINDS CIR STE A, West Sacramento (ETP Statutory Standard: \$10.50)</i>			
Administration Staff	1	\$15.00 - \$20.00	\$0.00
Field Supervisor	1	\$15.00 - \$30.00	\$0.00
Helper	13	\$13.00 - \$15.00	\$0.00
Installer	13	\$15.00 - \$25.00	\$0.00

Group # 2: Retrainee/Job Creation – Retrainee Initiative Program/Veterans Program			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
<i>Yolo County/HUA - 1347 TRADEWINDS CIR STE A, West Sacramento (ETP Statutory Standard: \$10.50)</i>			
Helper	2	\$13.00 - \$15.00	\$0.00
Installer	2	\$15.00 - \$25.00	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

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
	Cost Management
	Customer Service
	Decision Making
	Dispute Resolution
	Leadership
	Negotiation Techniques
	Product Knowledge
	Project Management
	Resource Planning
	Scheduling
Commercial Skills (Standard)	Adhesive Applications
	Equipment Operation
	Flooring Installation Techniques
	Forklift Operations
	Granite Installation Techniques
	Polishing & Templating Techniques
	Shower, Tubs, & Counter top Installation
	Site Clean-up
	Tile Installation Techniques
	Tool Operation
Computer Skills (Standard)	Intermediate/Advanced MS Office
	Peachtree
	QuickBooks

<i>Delivery Method /Level</i>	<i>Productive Laboratory</i>
Training Type (Level)	Planned Course Offerings
Commercial Skills	Adhesive Applications
	Equipment Operation
	Flooring Installation Techniques
	Forklift Operations
	Granite Installation Techniques
	Polishing & Templating Techniques
	Shower, Tubs, & Counter top Installation
	Site Clean-up
	Tile Installation Techniques
	Tool Operation

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	The field personnel, installers and helpers, will need PL training. This training will take the skills they have learned in a class/lab setting and apply it in the field. To provide all training in a class setting would be very disadvantageous financially and result in a massive waste of resources and materials. The PL training will involve an instructor allowing the individual to work and train while continually monitoring the work and providing correction and feedback.	
Describe the Equipment/Processes to be used in delivering the PL training	Equipment and tools to be used will include applicable tools of carpentry (saws, levels, hammers, etc), caulking guns, nailers, polishers, flooring jacks, woodworkers, drills, and similar tools of the flooring, counter top, bathroom installation trades. Trainer to trainee ratio of 1:2 is being requested as some of the materials used in the training process, such as granite, are extremely heavy and must be handled by 2 trainees at the same time.	
Describe Trainer Qualifications	Trainers have been identified by Citadel as their most expert and experienced individuals. These employees have been offered and accepted the opportunity to train newer employees and mentor these individuals to become proficient in flooring.	
Trainer to Trainee Ratios - If more than one PL class the ratios are the lowest and the highest trainer-to-trainee ratio	Trainer	Trainee
Ratio for One Class, or Minimum When More than One Class	1	2
Ratio for Maximum Ratio When More than One Class	1	2
PLT Approval	Yes	



**TRAINING PROPOSAL FOR
CORK SUPPLY USA, INC.
17-0886**

Delegation Order Date: 09/11/2017
Regional Office: San Francisco Bay Area Regional Office
Analyst Name: Wang, Samantha
Type of Proposal: Single Employer Contract (SE)
Funding Source: OSC

FUNDING OVERVIEW:

TOTAL ETP FUNDING: \$49,932.00				
Training Cost	Admin Cost	Support Cost	Substantial Contribution	Total In-Kind
\$43,420.00	\$6,512.00	N/A	\$0.00	\$68,000.00

PROJECT PROFILE:

Repeat Contractor:	Yes			
Estimated Number of Trainees:	73	High Unemployment Area:	No	
No. of Employees: (Applicant)	State:85 US:87 WorldWide:412	Turnover Rate: (Applicant)	11.00%	

Industry Sector(s)	Priority Industry
Manufacturing	Yes

FUNDING DETAILS:

Funding	Group No.	Attributes	Estimated No. of Trainees	Weighted Average Hours	Reimbursed Rate	Average Cost Per Trainee
OSC	1	S-RET	73	38	\$18.00	\$684.00
Total:			73			

TRAINING PLAN OVERVIEW:

Job Title	County of Workplace Location	Estimated Number of Trainees	Training Hours (Min-Max)	Wage Waiver	ETP Min Wage	Base Wage Range	Health Benefits Used	Post Retention Wage
Group #: 1	Attributes: S-RET				Reimbursement Rate: \$18.00			
Administrative Staff	Solano County	9	8-200		\$16.16	\$17.00 - \$44.39	0.00	\$17.00
Managers	Solano County	5	8-200		\$16.16	\$43.27 - \$72.12	0.00	\$43.27
Production Workers, Shipping & Receiving	Solano County	26	8-200		\$16.16	\$16.16 - \$29.71	0.00	\$16.16
Sales, Marketing, and Related Support	Solano County	21	8-200		\$16.16	\$24.04 - \$48.08	0.00	\$24.04
Supervisors	Solano County	7	8-200		\$16.16	\$19.25 - \$32.00	0.00	\$19.25
Technical Services: Quality Technician Laboratory, Incoming Inspection	Solano County	5	8-200		\$16.16	\$16.16 - \$21.62	0.00	\$16.16

Legend of Attributes	
Code	Description
S	Single Employer Contract
RET	Retrainee

INTRODUCTION

Founded in 1981 and headquartered in Benicia, Cork Supply USA, Inc., (Cork Supply), (<https://corksupply.com>) seeks ETP funding for retraining.

Cork Supply meets the Panel's Out-of-State Competition (OSC) requirements as a Manufacturer.

Training will be conducted at the Company's location in Benicia.

Products / Services

Cork Supply distributes "top of the bottle" products such as corks, closures, capsules, and other oak products specifically used in winemaking and bottling. Some of the Company's "top of the bottle" product line include: Sparkling Wine Closures, Screw Caps, and Natural Corks.

Cork Supply also operates a Cooperage in its Benicia facility, where this department manufactures wine barrels from American grown oak and French oak imported from France. Each wood plank is cut, shaped, and toasted in open flame to create the finishing product.

Customer Base

Cork Supply's customers include small to large wineries such as: Kendall-Jackson, Constellation Brands, Silverado Vineyards, Rutherford Hill Winery, and Caymus. The Company works with approximately 1200 wineries annually.

Prior Performance

This is Cork Supply's second ETP Agreement, and its second in the last five years. In the first Agreement, the Company earned \$49,870 of the total Agreement amount of \$94,703. During that time, training and administrative procedures were overseen by a few different Managers resulting in a lack of communication, project management, and some training not being captured. A new HR Manager was hired before the ETP contract termed September 1, 2016. However, this individual was not familiar with the ETP Contract administrative responsibilities of the approved training plan. Thus resulting in the Company's low performance of 51%.

For this new proposal, the CFO has reassured ETP staff that the Company is more experienced in delivering structured training and maintaining internal documentation, and has a better understanding of ETP's expectations. The Company, has continued to deliver internal training that is similar to ETP training approved and followed administrative procedures. To further assist with ensuring successful performance, the HR Manager and an Assistant will oversee the ETP funded training project.

PROJECT DETAILS

Purpose of Training

As the Company increases its product portfolio and customer demands, training is needed to improve workflow processes.

The focus of the training will be in the Company's two Production Departments: Cork Processing and Oak Manufacturing. In Cork Processing, new design flows are being implemented to reduce the production costs and improve efficiencies. In Oak Manufacturing, training will improve barrel production processes and trainees will learn the use of a Barrel Raising machine, which helps reduce the physical impact on staff.

In November, Cork Supply is also adding a new machine called ES Laser which burns the artwork onto the barrels. The artwork is created by the customers and Cork Supply's production staff modify the design to fit onto the barrels.

All occupations will receive the following types of training:

- **Business Skills:** Training will ensure that staff understands all products and procedures to better serve the growing customer demands.
- **Computer Skills:** As changes occur in the Company's ERP and CRM-Salesforce system, training is needed for staff to effectively navigate through sales and production data.
- **Continuous Improvement:** Through Lean Manufacturing, 5S, and ISO, these training will help staff reduce cost, eliminate waste, and produce products efficiently and in a timely manner.
- **Hazardous Materials:** Production Staff, Supervisors, and Managers will receive training to ensure safety and proper use of hazardous materials on the production floor.
- **Literacy Skills:** Training will provide some Production Staff better understanding of workflow procedures.
- **Manufacturing Skills:** Training will ensure all Production Staff is equipped when operating the machines when producing the products.

TRAINING DETAILS

Location	Substantial Contribution	Level Of Reduction
Cork Supply USA, Inc.	\$0.00	0.00%

TRAINING PLAN

Class/Lab training will be provided at the Benicia facility by internal subject experts. Cork Supply will use their two large conference rooms to conduct training. Some training will be delivered by external training vendors to be identified during the term of the contract. The HR Manager and an Assistant have been designated to oversee all training and administrative procedures.

The following types of training will be provided:

Training Curriculum		
Delivery Method - Type	Training Type	Training Level
Classroom/Simulated Laboratory	Business Skills	
Classroom/Simulated Laboratory	Commercial Skills	Standard

Classroom/Simulated Laboratory	Computer Skills	Standard
Classroom/Simulated Laboratory	Continuous Improvement Skills	
Classroom/Simulated Laboratory	Hazardous Materials Skills	
Classroom/Simulated Laboratory	Literacy Skills	
Classroom/Simulated Laboratory	Manufacturing Skills (ME)	Standard

Turnover Rate

ETP funds training for stable, secure jobs. Employer's turnover rate cannot exceed 20% for the facility where training is requested, as measured in the 12 months during proposal development.

Turnover Rate		
Location	City	Turnover Rate Percent
Cork Supply USA, Inc.	Benicia	11.00%

RECOMMENDATION

For the reasons set forth above, staff recommends approval of this Proposal.



**TRAINING PROPOSAL FOR
Direct Marketing Partners
17-0531**

Delegation Order Date: 09/29/2017
Regional Office: Sacramento Regional Office
Analyst Name: Lazarewicz, Jana
Type of Proposal: Single Employer Contract (SE)
Funding Source: OSC

FUNDING OVERVIEW:

TOTAL ETP FUNDING: \$20,460.00				
Training Cost	Admin Cost	Support Cost	Substantial Contribution	Total In-Kind
\$17,425.00	\$3,035.00	N/A	\$0.00	\$18,000.00

PROJECT PROFILE:

Repeat Contractor:	Yes			
Estimated Number of Trainees:	31	High Unemployment Area:	No	
No. of Employees: (Applicant)	State:23 US:23 WorldWide:23	Turnover Rate: (Applicant)	10.00%	
Industry Sector(s)				Priority Industry
Professional, Scientific, and Technical				No
Waste Management				No

FUNDING DETAILS:

Funding	Group No.	Attributes	Estimated No. of Trainees	Weighted Average Hours	Reimbursed Rate	Average Cost Per Trainee
OSC	1	S-RET-OWNER	23	30	\$22.00	\$660.00
	2	S-RET-JOBCREATION	8	30	\$22.00	\$660.00
		Total:	31			

TRAINING PLAN OVERVIEW:

Job Title	County of Workplace Location	Number of Trainees	Training Hours (Min-Max)	Wage Waiver	ETP Min Wage	Base Wage Range	Health Benefits Used	Contract Standard Min Wage
Group #: 1	Attributes: S-RET-OWNER					Reimbursement Rate: \$22.00		
Administrative Staff	Sacramento County	3	8-60		\$16.46	\$22.00 - \$22.00	0.00	\$22.00
Customer Service Staff	Sacramento County	13	8-60		\$16.46	\$16.00 - \$21.00	\$0.46	\$16.46
Manager	Sacramento County	3	8-60		\$16.46	\$22.00 - \$42.93	0.00	\$22.00
Owner	Sacramento County	1	8-60		\$16.46	\$40.00 - \$50.00	0.00	\$40.00
Sales Staff	Sacramento County	2	8-60		\$16.46	\$23.07 - \$34.62	0.00	\$23.07
Supervisor	Sacramento County	1	8-60		\$16.46	\$21.00 - \$21.00	0.00	\$21.00
Group #: 2	Attributes: S-RET-JOBCREATION					Reimbursement Rate: \$22.00		
Customer Service Staff - Job Creation	Sacramento County	7	8-60		\$13.72	\$16.00 - \$17.00	0.00	\$16.00
Marketing Staff - Job Creation	Sacramento County	1	8-60		\$13.72	\$17.00 - \$24.00	0.00	\$17.00

Legend of Attributes	
Code	Description
S	Single Employer Contract
RET	Retrainee
JOBCREATION	Job Creation ±Retrainee Initiative Program
OWNER	Owner

INTRODUCTION

Direct Marketing Partners, (DMP) (<http://www.directmarketingpartners.com>), seeks ETP funding for retraining. The Company, founded in 1991, is headquartered in Sacramento.

DMP is a woman-owned, business-to-business direct marketing company. DMP provides services such as lead generation, database management, email marketing, and marketing automation. The Company serves a wide array of vertical markets including Technology, Communications, Healthcare, Education, Life Sciences, Manufacturing, Physical Security, Professional Services, and the Public Sector. Customers are located worldwide and include many Fortune 500 companies. DMP meets the Panel's Out-of-State Competition requirements.

Training will be conducted in Sacramento.

PROJECT DETAILS

Purpose of Training

DMP seeks funding in order to provide training as follows:

This is DMP's second ETP Agreement and the second in the last five years. The previous contract focused on upgrading internal business networks by enhancing its callware and Contact Resource Management (CRM) systems to achieve greater efficiencies and enhance customer satisfaction. In this new proposal, DMP will focus on advanced CRM system operations. Training will not be duplicated from the prior agreement.

DMP offers state-of-the-art marketing practices which results in a dependency on ever-changing technology. As such, DMP is implementing new software systems such as Inbox Guru, Office 365, and WordPress. Training will also be offered in these new systems.

Retrainee - Job Creation

In this proposal, DMP has committed to hiring eight net new employees (Group Number 2). To be eligible for reimbursement under this Group Number, the trainees must be hired within the three-month period prior to Panel approval or during the term of contract.

This group includes seven Customer Service and one Marketing Staff person due to an increase in customer demand and expansion of services that include full-service webinars. The marketing position was newly-created created to perform tasks such as email deployment, surveys and project management. Newly hired employees will require an extensive amount of training to elevate their skills and proficiencies.

Temporary to Permanent Hiring

The trainees in Group Number 2 come under Panel guidelines for "Temporary to Permanent" employment. DMP retains all employees through temporary agencies, with the intention of hiring them into full-time, permanent positions after training. According to DMP the average time for "converting" temporary workers into full-time permanent employment is four months and will not exceed six months, with eligibility for health benefits 60 days after permanent hire.

These trainees must be determined eligible to participate in ETP-funded training before the start of training, while on payroll with the temporary agency. However, the retention and post-retention wage requirements cannot be satisfied until after they have been hired by DMP. Until then, DMP will not receive progress payments.

TRAINING DETAILS

Location	Substantial Contribution	Level Of Reduction
Direct Marketing Partners	\$0.00	0.00%

TRAINING PLAN

The following types of training will be provided:

Training Curriculum		
Delivery Method - Type	Training Type	Training Level
Classroom/Simulated Laboratory	Business Skills	
Classroom/Simulated Laboratory	Computer Skills	Standard
Classroom/Simulated Laboratory	Continuous Improvement Skills	
Classroom/Simulated Laboratory	Management Skills	
E-Learning - Instructor Led/Distance Learning	Computer Skills	Standard

Turnover Rate

ETP funds training for stable, secure jobs. Employer's turnover rate cannot exceed 20% for the facility where training is requested, as measured in the 12 months during proposal development.

Turnover Rate		
Location	City	Turnover Rate Percent
Direct Marketing Partners	Sacramento	18.00%

Commitment to Training

The Company spends approximately \$18,000 annually for 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

DMP's Human Resources Manager and additional staff will be dedicated to coordinating all training efforts, including scheduling, enrolling, 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.

SUBCONTRACTOR

N/A

PERFORMANCE

Active Contract

N/A

Prior Performance

Below summarizes Contractor's performance under prior contract(s) completed within the last five years:

Agreement Number: ET15-0295

Location: Sacramento

Term: 9/2/2014 - 9/1/2015

Approved Amount: \$34,320

Payment Earned: \$20,065 (58%)

* As a first-time contractor, DMP struggled with ETP recordkeeping and training requirements. Many of the training hours delivered were ineligible because trainees did not meet retention requirements. Under this proposal, the Human Resources Manager and staff are dedicated, to ensure that all ETP program requirements are met. The current proposal has been "right-sized" consistent with prior earnings.

RECOMMENDATION

Staff recommends approval of this proposal.



TRAINING PROPOSAL FOR

Eco.logic Brands Inc.

17-0936

Panel Meeting Date: 10/27/2017
Delegation Order Date: 10/03/2017
Regional Office: Sacramento Regional Office
Analyst Name: Jesse Dongallo
Type of Proposal: Single Employer (SB), Small Business Program
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$ 23,140.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 23,140.00	N/A	\$ 0.00	\$ 19,170.00

APPLICANT PROFILE

Company Summary	Eco.logic Brands (Ecologic) specializes in the manufacture of 100% recycled container shells used for perishable and non-perishable commercial products.
------------------------	--

Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. of Employees (Applicant)	State: 16	US: 16	World Wide: 16
Turnover Rate (Applicant)	7.14 %		
Repeat Contractor	Yes		

High Unemployment Area	Yes
Unions	

TRAINING PROFILE

Training Objective	The Company's objective is to train staff on new equipment procedures and improve production efficiency.
---------------------------	--

Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Owner, Retrainee	1	\$ 26.00	40	\$ 1040	8 - 60
1	Retrainee	16	\$ 26.00	40	\$ 1040	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	5	\$ 26.00	50	\$ 1300	8 - 60

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 2008 and headquartered in Manteca, Eco.logic Brands, Inc. (Ecologic) is an eco-friendly manufacturer of 100% recycled container shells using proprietary technology. These combine a rigid molded pulp outer shell with a thin plastic inner liner and re-sealable cap. The molded fiber shell is made from 100% recycled material and is fully compostable or may be recycled with other paper products. The inner liner consist of Bisphenol A plastic and uses up to 70% less plastic than comparable plastic jugs.

Ecologic also manufactures and designs container bottles to the specifications of its customers. Originally, the Company's containers are used for products such as, beverages, food condiments, cosmetics, home cleaning and laundry detergent containers.

Ecologic markets to international and domestic companies that seek an eco-friendly option for packaging. This includes companies such as, Purina, Seventh Generation, Nutrasumma, Green Lab Berlin, BIPA, Body Nutrition and L'Oreal.

Training will only include trainees at Ecologic's Manteca location.

2. Current Training Project Details

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

Purpose of Training

This is Ecologic's second ETP contract, and the second within the last five years. In the previous Agreement, training focused on production machinery, business, computer, and continuous improvement skills. Even though some training topics are similar, trainees will not receive duplicate training.

Ecologic recently invested over \$2.5 million in new and upgraded manufacturing equipment which will increase production capacity, and improve cost efficiency. Staff will need operational and technological training to master the new production processes.

In addition, Ecologic recently contracted with L'Oreal Cosmetics shampoo division, to produce containers. Specific training will be given to staff to meet the increased production demands, quality standards, and specifications of this product line, which is expected to be available this fall.

Management will receive training in leadership, decision making,

PROPOSED TRAINING PROJECT DETAILS

	motivation and team building to foster a healthy and productive work environment. Field staff will receive training in Standard Operating Procedures, Material Requirement Planning, and purchasing. Cross-training will also be delivered to employees on the production lines.
Training Infrastructure and Administrative Plan	<p>The Company's Operations Manager, Logistics Specialist, and Software Program Specialist are dedicated to overseeing this project.</p> <p>The Company will use four in-house production trainers to provide role-specific training.</p>
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
Business Skills: Training will be provided to all occupations to increase product knowledge and soft skills. Examples of training topics include: Communication Skills, Customer Service, and Presentations skills.	
Computer Skills: Training will be provided to Administrative Staff and Managers to improve software skills and proficiencies. Examples of training topics include: Intermediate and Advanced Microsoft Office.	
Continuous Improvement: Training will be provided to all occupations to increase production efficiencies. Examples of training topics include: Principles of Team Building, Problem Solving and Decision Making, Total Quality Control, and Production Scheduling.	
Hazardous Materials Skills: Training will be provided to Production and Warehouse Staff to improve staff knowledge of Hazardous Materials. Trainees will receive training in the Handling of Hazardous Materials.	
Management Skills: Training will be provided to Managers to improve leadership and managerial skills. Examples of topics include: Motivation, Team Building, and Leadership.	
Manufacturing Skills: Training will be provided to Production and Warehouse Staff to improve manufacturing processes and skills. Examples of topics include: New Equipment Adjustments, Pulping, Standard Operating Procedures, and Maintenance on Existing Equipment.	

PROPOSED TRAINING PROJECT DETAILS

Delivery Method/Level	E-Learning - Computer Based Training (CBT)
Summary	
<p>Computer Skills: Training will be provided to Administrative Staff and Managers to improve software skills and proficiencies. CBT will supplement class/lab training. Examples of training topics include: Intermediate and Advanced Microsoft Office.</p> <p>CBT hours are capped at 50% of the total training hours per-trainee.</p>	

4. Additional Company or Training Project Details

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

Retrainee - Job Creation

In support of Job Creation, the Panel is offering incentives to companies that commit to hiring new employees, Training for newly-hired employees will be reimbursed at a higher rate, and subject to a lower post-retention wage. The reimbursement rates for Job Creation, under this contract will be:

- \$26 for all delivery methods (Class/Lab; Productive Lab; E-Learning) with the following exceptions.
- \$8 for CBT (delivery type)

Ecologic has committed to hiring 5 net new employees. 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 the contract.

Ecologic is expanding their workforce for the following reasons:

The recent acquisition of the L'Oréal Shampoo division contract has created a need for an increase of staff to keep up with the demand of production requested by the customer. The addition of new equipment also requires additional staff to operate at maximum capacity.

4.1 Program Waivers

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

High Unemployment Area (HUA):

All trainees work in a High Unemployment Area (HUA), a region with unemployment exceeding the state average by 25%. The determination of HUA status is based on unemployment data from the Labor Market Division of the Employment Development Department.

The Company's location in San Joaquin County qualifies for HUA status under these standards; however, Ecologic is not requesting a wage modification.

PROPOSED TRAINING PROJECT DETAILS

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or %
Development	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

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

Previous Contract Activity					
Agreement Number	Locations	Term	Approved Amount	Project Earnings	Performance %
ET14-0168	Oakland	09/23/2013 – 09/22/2015	\$73,840	\$49,400	67%
Notes	<p>Ecologic earned \$49,400 of the Agreement amount of \$73,840. The Company experienced a series of changes in their ETP contact person, in-house, which adversely affected training. This slowed down the documentation of training as well as the implementation of their training plan resulting in poor performance.</p> <p>To ensure successful performance, Ecologic has assigned multiple staff members within their training infrastructure to ensure ample coverage of the administration and implementation of their training plan. In addition, the requested funding amount has been “right sized” to the amount earned in the prior contract.</p>				

4.4 Supporting Panel Proposal Documentation

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

Attachment 1 - Group and Job Title Details

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

Group # 1: Retrainee/Owner			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
San Joaquin County/HUA - 550 Carnegie Street, Manteca (ETP Required Wage: \$12.12)			
Administration	3	\$25.00 - \$29.00	\$0.00
Managers	4	\$35.00 - \$41.00	\$0.00
Owner	1	\$42.00 - \$50.00	\$0.00
Production/Warehouse Operators	6	\$18.09 - \$21.44	\$0.00
Sales Representative	2	\$19.00 - \$23.00	\$0.00

Group # 2: Retrainee/Job Creation – Retrainee Initiative Program			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
San Joaquin County/HUA - 550 Carnegie Street, Manteca (ETP Required Wage: \$10.50)			
Production/Warehouse Operators	5	\$15.00 - \$18.50	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

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
	Negotiation
	Presentation Skills
	Time/Meeting Management
Computer Skills (Standard)	
	Intermediate and Advanced Microsoft Office
Continuous Improvement Skills	
	LEAN Manufacturing Principles
	Principles of Team Building
	Problem Solving and Decision Making
	Production Scheduling
	Team Leadership
	Total Quality Control
Hazardous Materials Skills	
	Hazardous Chemical Cleaning/Handling
	Hazardous Material Handling
	New Equipment Safety and Processes
Management Skills	
	Decision Making
	Leadership
	Motivation
	Team Building
Manufacturing Skills (ME) (Standard)	
	Bekum Machine
	Intergration
	Maintenance on existing equipment
	Material Requirement Planning and Purchasing
	Molding - TPM/Ipsung
	New Equipment Adjustments
	New Equipment Operation
	New Equipment Performance Specification
	New Equipment Set Up
	New Equipment Tool Changes
	New Equipment Troubleshooting
	Pouch Machine
	Pulping
	Standard Operating Procedures

<i>Delivery Method /Level</i>	<i>E-Learning – Computer Based Training (CBT)</i>	
Training Type (Level)	Planned Course Offerings	Standard Hours

Attachment 2 - Training Delivery and Curriculum Listing

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

Computer Skills		
	Microsoft Intermediate Excel	8.00
	Microsoft Intermediate Powerpoint	8.00
	Microsoft Intermediate Word	8.00



**TRAINING PROPOSAL FOR
ELROB, INC. 17-0840**

Delegation Order Date: 09/18/2017
Regional Office: San Diego Regional Office
Analyst Name: Davey, Joe
Type of Proposal: Single Employer Contract (SE)
Funding Source: OSC

FUNDING OVERVIEW:

TOTAL ETP FUNDING: \$41,496.00				
Training Cost	Admin Cost	Support Cost	Substantial Contribution	Total In-Kind
\$36,102.00	\$5,394.00	N/A	\$0.00	\$45,500.00

PROJECT PROFILE:

Repeat Contractor:		Yes		
Estimated Number of Trainees:		19	High Unemployment Area:	No
No. of Employees: (Applicant)	State:	50	Turnover Rate: (Applicant)	14.00%
	US:	50		
	World Wide:	120		
Industry Sector(s)				Priority Industry
Manufacturing				Yes

FUNDING DETAILS:

Funding	Group No.	Attributes	Estimated No. of Trainees	Weighted Average Hours	Reimbursed Rate	Average Cost Per Trainee
OSC	1	S-RET-JOB CREATION TEMP PERM	19	84	\$26.00	\$2,184.00
		Total:	19			

TRAINING PLAN OVERVIEW:

Group #: 1	Attributes: S-RET-JOBCREATION-TEMPPERM					Reimbursement Rate: \$26.00		
Operator-Assembly	Orange County	19	8-200		\$14.35	\$12.59 - \$16.50	\$1.76	\$14.35

Legend of Attributes	
Code	Description
S	Single Employer Contract
RET	Retrainee
JOBCREATION	Job Creation/Retrainee Initiative Program
TEMPPERM	Temp to Permanent

INTRODUCTION

Founded in 1988, and headquartered at its single location in Garden Grove, ELROB, INC., dba El-Com System Solutions (El-Com), (<http://www.elcomcabletek.com>) seeks ETP funding for retraining.

El-Com meets the Panel's Out-of-State Competition (OSC) requirements. Training will be conducted at the Company's location in Garden Grove.

Products / Services

El-Com System Solutions designs and manufactures unique electro-mechanical components and assemblies for the aerospace, military, industrial, and commercial industries. The Company provides systems integration solutions, mechanical design and engineering, precision machining, and other services. Products include airborne cable harnesses, Chomerics shielding, rugged computer equipment and military and avionic cable harnesses.

Customer Base

Customers include Boeing, L3 Communications, Raytheon, Lockheed Martin, Crane Aerospace, Northrop Grumman and some Israeli defense companies including Rafael, Mantek and Elbit. The Company recently received a contract with SpaceX.

PROJECT DETAILS

Purpose of Training

El-Com recently won a contract with Space X to manufacture aerospace cable assemblies and wire harnesses that must meet the most stringent quality standards and SpaceX's requirements. This new contract requires the Company to hire and train approximately 50 assemblers/operators over the next 12 to 24 months. In this proposal El-Com is requesting funding for training 19 newly-hired retrainees for the first year.

Because of this new contract, El-Com must hire and train new employees to meet production requirements. Employees must be certified in Inter-Process Communications (IPC) IPC/WHMA-A-620A Specialist Training – Modules 1 thru 8, as well as SpaceX's Workmanship Standards. Space X has been providing guidance in designing the curriculum for El-Com's expanded workforce. Each newly-hired retrainee will receive at least 84 hours of training: 60 hours of class/lab and 24 hours of Productive Lab training in Manufacturing Skills.

TRAINING DETAILS

Retrainee - Job Creation

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

- ‡ \$26 for all delivery methods (Priority-Industry, small business rate) (Class/Lab; Productive Lab; E-learning) with the following exception:
\$8 for CBT (delivery Type)

El-Com has committed to hiring 19 new employees. Trainees must be hired within the three-month period prior to Panel approval or during the term of contract. Substantial Contribution requirement is waived. Also, a Turnover Rate penalty will not be assessed.

El-Com is expanding their workforce for the following reasons:

Expanded customer base, Expanded product line, New Customer base, New product line

Temporary to Permanent Hiring

Temp-to-Perm hiring allows trainees to begin training while employed on either on a part-time basis or through a temporary agency. However, Temp-to-Perm trainees are not considered eligible and cannot be enrolled until they are hired on a permanent full-time basis no later than 180-days from the start-of-training. Once hired into a permanent full-time position, Temp-to-Perm trainees will be eligible for progress payments.

The following occupations are Temp to Perm: Production Occupations

TRAINING PLAN

The following types of training will be provided:

Training Curriculum		
Delivery Method - Type	Training Type	Training Level
Classroom/Simulated Laboratory	Manufacturing Skills (ME)	Standard
Productive Laboratory	Manufacturing Skills (ME)	Standard

Training Hours Modification

Retraining hours per trainee are capped at standard hour. However, EI-Com requests an increase because trainees will be newly-hired and must meet the stringent requirements of SpaceX and IPC Certification. Trainees will need at least 84 hours of training and as much as 200 hours. The table below shows the details:

Group No.	Waiver Value	Justification
1	200.00	This costing group is a candidate for Cap-Max Hours of Training waiver.

Turnover Rate

ETP funds training for stable, secure jobs. Employer's turnover rate cannot exceed 20% for the facility where training is requested, as measured in the 12 months during proposal development.

Turnover Rate		
Location	City	Turnover Rate Percent
ELROB, INC.	Garden Grove	14.00%

Productive Laboratory

Productive Laboratory (PL) trainees may produce goods for profit as part of the training, in the courses identified under the Curriculum. For PL the trainer-to-trainee ratio will not exceed 1:3. The ratio may be lower, and maximum hours per-trainee may be capped, as shown in the Curriculum: Production Occupations

EI-Com will provide the 19 newly-hired retrainees up to 24 hours of PL training as necessary. Because trainees will be newly-hired and have little experience in electronics manufacturing at the high level necessary to meet SpaceX's requirements, intensive training using hands-on, intensive trainer-trainee interaction is necessary to ensure that products are made properly. Most trainer-to-trainee interactions will be 1:1; however, there will be instances where up to 3 trainees will be trained in the same skills at the same time. Therefore, EI-Com requests a 1:3 trainer-to-trainee ratio.

Training Infrastructure

El-Com has identified the COO to manage the ETP Project. He will oversee the project, including managing the scheduling, delivery, and documentation of training.

SUBCONTRACTOR

El-Com retained the below Development Subcontractor(s) to perform Development services for a fee shown in the table below:

Development		
Subcontractor Name	City	Service Cost
California Manufacturing Technology Consulting	Torrance	\$4,150.00

PERFORMANCE

Prior Performance

Below summarizes Contractor's performance under prior contract(s) completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET12-0258	Garden Grove	12/31/11 – 12/30/13	\$99,372	\$0 (0%)

ET12-0258 - Due to a customer order cancellation and defense industry contraction, El-Com was unable to perform in its first ETP contract. As a contract manufacturer, El-Com is working aggressively to expand its customer base. SpaceX is the largest opportunity the company has had in many years, as the aerospace industry has contracted in the past decade. El-Com states the skills and quality specifications identified by Space X are key factors that will allow El-Com to secure new business in the aerospace and other markets. The company is positioning itself to take on new business, both with Space X and beyond. As such, the continued planned training is not dependent on one customer base, as was the case in the prior training plan.

RECOMMENDATION

For the reasons set forth above, staff recommends approval of this proposal.



TRAINING PROPOSAL FOR

ICORE International, Inc. dba Zodiac Interconnect US

17-0721

Panel Meeting Date: 08/25/2017
Delegation Order Date: 07/05/2017
Regional Office: Sacramento Regional Office
Analyst Name: Jesse Dongallo
Type of Proposal: Single Employer
Funding Source: Out-of-State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$25,200.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$25,200.00	N/A	N/A	\$39,825.00

APPLICANT PROFILE

Company Summary	ICORE International, Inc. dba Zodiac Interconnect US (Zodiac Interconnect) designs and manufactures electro-mechanical components, including electrical harnesses and harness protection gear for the Aerospace industry.
------------------------	---

Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. of Employees (Applicant)	State: 151	US: 151	World Wide: 30,000
Turnover Rate (Applicant)	1.00 %		
Repeat Contractor	No		
High Unemployment Area	No		
Unions	N/A		

TRAINING PROFILE

Training Objective

Training will enhance employee skills related to their current jobs and help them advance within the company.

Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	56	\$18.00	25	\$450	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Zodiac Interconnect US (Zodiac Interconnect) seeks ETP funding for retraining. The Company, founded in 1960, is headquartered in Santa Rosa.

Zodiac Interconnect designs and makes interconnecting electrical products and systems for safety-critical environments in the aerospace, defense, industrial, and energy industries. Zodiac Interconnect maintains close proximity to its customers with 7 manufacturing facilities and 4 engineering centers located around the world. The Company has three facilities in the Americas: Zodiac Interconnect US in California, Zodiac Interconnect in Canada (Ontario), and Zodiac Interconnect in Mexico (Chihuahua).

The Company invests heavily in Research & Development to obtain significant expertise in state-of-the-art technologies which allows it to provide a range of products and custom solutions. The Company has developed partnerships in the aerospace sector as needed for its 'build to specification' projects.

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>New technologies, systems and methodologies are continually being implemented in the aerospace industry. Specializing in the design and manufacture of safety-critical and harsh environment electrical and wiring systems, Zodiac Interconnect must meet detailed requirements of the commercial and military industry.</p> <p>Training will aim to enhance technical skills as well as communication and leadership skills. Employees will also receive training to obtain and/or maintain certifications, such as ISO14001, AS9100, and Hazardous Waste Management. These certifications are required and recognized within the industry.</p> <p>Training will also introduce staff to new equipment (such as laser scanning technology) and upgrades to current production processes.</p>
Training Infrastructure and Administrative Plan	<p>The Human Resources Director, Manager, and HR Assistant will be dedicated to overseeing and coordinating this training project.</p> <p>The Company has also developed an internal training matrix of 10 in-house trainers (Managers and Supervisors) in the operations, assembly and quality control departments.</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 include Business Skills, Computer Skills, Continuous Improvement, and Management Skills to improve processes and soft skills. Manufacturing Skills will provide trainees with skills to operate equipment/tools.	

Delivery Method/Level	E-Learning - Computer Based Training (CBT)
Summary	
Trainees will receive Hazardous Materials skills via CBT. Trainees will also receive CBT in Manufacturing Skills in Mastercam Online Training.	

4. Additional Company or Training Project Details

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

N/A

4.1 Program Waivers

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

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or %
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

4.4 Supporting Panel Proposal Documentation

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

Attachment 1 - Group and Job Title Details

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

Group # 1: Retrainee			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
<i>Sonoma County - 3780 FLIGHTLINE DR, Santa Rosa (ETP Required Wage: \$16.16)</i>			
Accounting Staff	3	\$22.17 - \$36.67	\$0.00
Administrative Support	3	\$20.83 - \$45.04	\$0.00
Assemblers	19	\$13.50 - \$27.15	\$2.50
Conflex Operators	1	\$20.00 - \$25.00	\$0.00
Engineers	6	\$30.52 - \$55.00	\$0.00
Lean and Safety Specialist	1	\$31.00 - \$35.00	\$0.00
Machinists	6	\$22.33 - \$37.43	\$0.00
Management Staff	6	\$45.67 - \$52.88	\$0.00
Quality Assurance	7	\$18.05 - \$26.55	\$0.00
Sales Rep III	1	\$46.00 - \$50.00	\$0.00
Supervisor	3	\$35.88 - \$43.00	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

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	Grammar and Business Writing Skills
	Technical Writing Course
Computer Skills (Standard)	Microsoft Office Suite - Intermediate and Advance
Continuous Improvement Skills	APICS
	AS9100
	AS9100 Auditor Certification
	AS9100 Rev D Standard Training
	ISO14001
Literacy Skills	English as a Second Language
Management Skills	Leadership Effectiveness Training
	Manage in Difficult Environment
	Negotiation
	Organization Management Skills
	Project Management
Manufacturing Skills (ME) (Standard)	DITMCO Technical Course
	DTMCO Test Equipment Training
	Injection Molding Training
	Metrology/Calibration
	NADCAP Welding Inspection Course

<i>Delivery Method /Level</i>	<i>E-Learning – Computer Based Training (CBT)</i>	
Training Type (Level)	Planned Course Offerings	Standard Hours
Hazardous Materials Skills	Hazwoper - refresher course	8.00
	Title 22 Refresher Course - refresher course	8.00
Manufacturing Skills (ME) (Standard)	Mastercam Online Training	8.00



**TRAINING PROPOSAL FOR
NORTHERN CENTRAL DISTRIBUTING, INC.
17-0836**

Delegation Order Date: 09/11/2017
Regional Office: Sacramento Regional Office
Analyst Name: Kaiser, Cristina
Type of Proposal: Single Employer Contract (SE)
Funding Source: OSC

FUNDING OVERVIEW:

TOTAL ETP FUNDING: \$46,640.00				
Training Cost	Admin Cost	Support Cost	Substantial Contribution	Total In-Kind
\$40,190.00	\$6,450.00	N/A	\$0.00	\$45,000.00

PROJECT PROFILE:

Repeat Contractor:	Yes		
Estimated Number of Trainees:	51	High Unemployment Area:	Yes
No. of Employees: (Applicant)	State:47 US:47 WorldWide:47	Turnover Rate: (Applicant)	10.00%

Industry Sector(s)	Priority Industry
Retail	No

FUNDING DETAILS:

Funding	Group No.	Attributes	Estimated No. of Trainees	Weighted Average Hours	Reimbursed Rate	Average Cost Per Trainee
OSC	1	S-RET	47	40	\$22.00	\$880.00
	2	S-RET-JOBCREATION	4	60	\$22.00	\$1,320.00
		Total:	51			

TRAINING PLAN OVERVIEW:

Job Title	County of Workplace Location	Estimated Number of Trainees	Training Hours (Min-Max)	Wage Waiver	ETP Min Wage	Base Wage Range	Health Benefits Used	Post Retention Wage
Group #: 1	Attributes: S-RET					Reimbursement Rate: \$22.00		
Administration	Fresno County	11	8-60	HUA Wage	\$12.12	\$13.00 - \$36.44	0.00	\$13.00
Information Technology	Fresno County	1	8-60		\$16.16	\$20.00 - \$28.85	0.00	\$20.00
Managers	Fresno County	6	8-60		\$16.16	\$30.00 - \$59.00	0.00	\$30.00
Sales	Fresno County	11	8-60		\$16.16	\$15.00 - \$44.00	\$1.16	\$16.16
Warehouse/Shipping	Fresno County	18	8-60	HUA Wage	\$12.12	\$11.75 - \$26.75	\$0.37	\$12.12
Group #: 2	Attributes: S-RET-JOB CREATION					Reimbursement Rate: \$22.00		
Sales- Job Creation	Fresno County	4	8-60		\$13.22	\$15.00 - \$25.00	0.00	\$15.00

Legend of Attributes	
Code	Description
S	Single Employer Contract
RET	Retrainee
JOB CREATION	Job Creation - Retrainee Initiative Program

INTRODUCTION

Founded in 1983 and headquartered in Fresno, Northern Central Distributing, Inc. (Central Distributing), (<http://centraldistributing.com>) has become a premier destination for contractors and the general public looking to purchase appliances, plumbing, fans, lighting, and fixtures for their homes.

Central Distributing meets the Panel's Out-of-State Competition (OSC) requirements.

Training will be conducted at the Fresno location.

Products / Services

Central Distributing caters to those purchasing fireplaces, appliances, lighting, furniture, plumbing, home décor, central vac, fans, and bathroom vanities. The Company offers both wholesale and retail sales of these products.

Customer Base

Customers include contractors and the general public in the Central Valley and online customers worldwide.

PROJECT DETAILS

Purpose of Training

This will be Central Distributing's second ETP agreement and first in the past 5 years. When Central Distributing first opened in 1983, it only sold fireplace inserts to customers located in the Central Valley. To increase competitiveness and to expand its reach, the Company added additional home products such as appliances and lighting to their inventory. These home improvement products have increased sales in the last couple of years and continue to be a major contributor to their increase in revenues.

To improve internal processes and allow Central Distributing to meet product demand, the Company invested in a new Enterprise Resource Planning (ERP) system. Training in this Agreement will focus mainly on the ERP system as the system will impact all occupations within the organization. Each occupation will receive approximately 40 hours of training in the ERP system to become competent. The ERP will now contain the following aspects of the business: customer relationship management, financials, stock control, material requirements planning, office integration, purchasing, sales management, service management, reporting, and Sarbanes-Oxley compliance.

In addition to ERP training, staff will receive Lean process training, soft skills training, and other job specific training.

Training Infrastructure

Central Distributing has retained Strategic Business Services, LLC in Visalia to assist with ETP project administration. In addition, the Company has designated 3 staff to schedule and oversee the training as well as collect and submit training rosters to the administrative subcontractor for data entry in the ETMS system.

TRAINING DETAILS

High Unemployment Area

This is a region(s) with unemployment exceeding the state average by 15%.

The Company's location in Fresno qualifies for HUA status and Central Distributing is requesting a HUA Wage modification for 20 of the 47 trainees in Group 1. For these trainees, the Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start of training

wages. Central Distributing is requesting a wage modification from \$16.16 per hour to \$12.12 per hour Group 1.

Occupation	Waiver Wage	No. of Trainees
Business and Financial Operations Occupations	\$12.12	11
Transportation and Material Moving Occupations	\$12.12	18

Retrainee - Job Creation

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

- \$22 for all delivery methods (Class/Lab; Productive Lab; E-learning) with the following exceptions
 - \$22 for AT (training Level)
 - \$8 for CBT (delivery Type)

Central Distributing has committed to hiring 4 new employees. Trainees must be hired within the three-month period prior to Panel approval or during the term of contract. Substantial Contribution requirement is waived. Also, a Turnover Rate penalty will not be assessed.

Central Distributing is expanding their workforce for the following reasons:

Recent increase in demand and revenues, as well as, an increased reach of their business due to internet sales has caused the need to hire additional sales representatives. These net new hires will further focus on maintaining current customer relations, building new relationships with regional/local builders, and expanding their reach on the internet.

Location	Substantial Contribution	Level Of Reduction
NORTHERN CENTRAL DISTRIBUTING, INC.	\$0.00	0.00%

TRAINING PLAN

Training Curriculum		
Delivery Method - Type	Training Type	Training Level
Classroom/Simulated Laboratory	Business Skills	
Classroom/Simulated Laboratory	Commercial Skills	Standard
Classroom/Simulated Laboratory	Computer Skills	Standard
Classroom/Simulated Laboratory	Continuous Improvement Skills	
E-Learning - Computer Based Training (CBT)	Computer Skills	
E-Learning - Instructor Led/Distance Learning	Business Skills	

Turnover Rate

ETP funds training for stable, secure jobs. Employer's turnover rate cannot exceed 20% for the facility where training is requested, as measured in the 12 months during proposal development.

Turnover Rate		
Location	City	Turnover Rate Percent
NORTHERN CENTRAL DISTRIBUTING, INC.	Fresno	10.00%

Computer-based Training (CBT)

Some staff may receive CBT that will focus on the Company's new ERP system. This training will supplement Class/Lab training. CBT hours are capped at 50% of total training hours per-trainee.

SUBCONTRACTOR

Central Distributing retained Strategic Business Solutions, LLC to perform administrative services for a fee shown in the table, not to exceed 13% of payment earned. Strategic Business Solutions, LLC will also perform Development services for a fee shown in the table, not to exceed \$3290.00

Admin		
Subcontractor Name	City	Service Cost
Strategic Business Solutions, LLC	Visalia	\$6,063.00

Development		
Subcontractor Name	City	Service
Strategic Business Solutions, LLC	Visalia	\$3,290.00

PERFORMANCE**Active Contract**

No active contract in the past 5 years.

Prior Performance

No prior contract in the past 5 years.

RECOMMENDATION

For the reasons set forth above, staff recommends approval.



TRAINING PROPOSAL FOR
Pactiv LLC
17-0565

Delegation Order Date: 09/18/2017
Regional Office: Sacramento Regional Office
Analyst Name: Lazarewicz, Jana
Type of Proposal: Single Employer Contract (SE)
Funding Source: OSC

FUNDING OVERVIEW:

TOTAL ETP FUNDING: \$31,860.00				
Training Cost	Admin Cost	Support Cost	Substantial Contribution	Total In-Kind
\$27,705.00	\$4,155.00	N/A	\$0.00	\$32,000.00

PROJECT PROFILE:

Repeat Contractor:	Yes		
Estimated Number of Trainees:	118	High Unemployment Area:	Yes
No. of Employees: (Applicant)	State:1050 US:12000 WorldWide: 12000	Turnover Rate: (Applicant)	2.00%

Industry Sector(s)	Priority Industry
Manufacturing	Yes

FUNDING DETAILS:

Funding	Group No.	Attributes	Estimated No. of Trainees	Weighted Average Hours	Reimbursed Rate	Average Cost Per Trainee
OSC	1	S-RET-TEMPPERM	118	15	\$18.00	\$270.00
		Total:	118			

TRAINING PLAN OVERVIEW:

Job Title	County of Workplace Location	Estimated Number of Trainees	Training Hours (Min-Max)	Wage Waiver	ETP Min Wage	Base Wage Range	Health Benefits Used	Post Retention Wage
Group #: 1	Attributes: S-RET-TEMPPERM					Reimbursement Rate: \$18.00		
Logistics Staff	Fresno County	12	8-200		\$16.16	\$16.16 - \$20.44	0.00	\$16.16
Maintenance Staff	Fresno County	10	8-200		\$16.16	\$20.97 - \$28.96	0.00	\$20.97
Managers/Supervisors	Fresno County	9	8-200		\$16.16	\$19.44 - \$30.00	0.00	\$19.44
Production Staff 1	Fresno County	83	8-200		\$16.16	\$16.16 - \$27.96	0.00	\$16.16
Production Staff 2	Fresno County	4	8-200	HUA Wage	\$12.12	\$12.21 - \$16.15	0.00	\$12.21

Legend of Attributes	
Code	Description
S	Single Employer Contract
RET	Retrainee
TEMPPERM	Temp to Permanent

INTRODUCTION

Founded in 1970 and headquartered in Fresno, Pactiv LLC, (Pactiv) manufactures food packaging products used across North America by supermarket, packer/processor, foodservice, and restaurant industries. The Company's products include custom and stock foam, plastic, aluminum, pressed-paperboard, polyethylene (PE) coated board, and molded-fiber packaging.

The Company has ten facilities in California: Fresno, Kern, Los Angeles (5), San Bernardino, San Joaquin, and Tehama counties; however, training in this Agreement will only take place at their Fresno location.

Pactiv meets the Panel's Out-of-State Competition (OSC) requirements, as a manufacturer.

PROJECT DETAILS

Purpose of Training

This is Pactiv's ninth ETP Agreement and the third in the past five years. As a result of prior ETP Agreements, Pactiv has developed a training program that ensures trainees receive skills which make them more promotable in the manufacturing industry. The Company has also implemented a pay scale adjustment system in combination with the training program where trainees have the ability to receive pay increases after they have completed specified training modules.

In their prior contract, Pactiv focused on training staff in new technology and manufacturing concepts to increase production efficiency. Under this new proposal, training will focus on the continued improvement of production processes as well as new equipment and software. Pactiv recently purchased a new padding machine and conveyor system which will be installed in early 2018. Staff will require operational and maintenance training for the new equipment. Another focus for Production Staff will be their new automation processes and software. The automation and software will require Pactiv to provide its workers with technological and process improvement skills training necessary to be more efficient and productive. The Company has also upgraded their payroll software to ADP Vantage HCM and this will be an emphasis of their training as well.

Some course topics may repeat from their prior Agreement; however, trainees will not receive duplicate training.

TRAINING DETAILS

High Unemployment Area

Trainees in Group Number 1 work in a High Unemployment Area (HUA), with unemployment exceeding the state average by 25%. The Company's location in Fresno qualifies for the ETP Reduced Standard Wage rather than the Standard Wage. The Panel may modify the ETP Standard Wage for these trainees by up to 25% if post-retention wages exceed the start-of-training wages.

Pactiv is requesting a 25% wage modification (from \$16.16 per hour to \$12.12 per hour) for four Production Staff 2 trainees in Group Number 1.

Occupation	Waiver Wage	No. of Trainees
Production Staff 2	\$12.12	4

Temporary to Permanent Hiring

Two Production Staff trainees in Group Number 1 come under the Panel guidelines for "Temporary to Permanent" employment. Pactiv often hires temporary employees before making them permanent employees as a type of probationary period. The Company retains new employees through the Resource Employment Solutions temporary agency, with the intention of hiring them into full-time, permanent positions. According to Pactiv the average time for "converting" temporary workers into full-time permanent employment is 12 months. However, ETP limits the time period in which temporary workers must be "converted" into permanent full-time positions to 6 months. Pactiv understands that the date-of-hire must not be more than six months from the start of training.

These trainees must be determined eligible to participate in ETP-funded training before the start of training, while on payroll with the temporary agency. However, the retention and post-retention wage requirements cannot be satisfied until after they have been hired by Pactiv. Until then, Pactiv will not receive progress payments.

Commitment to Training

Pactiv's training budget for the Fresno facility is approximately \$100,000. 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

Pactiv's Human Resource Manager and Administrative Staff are dedicated to coordinating all training efforts, including scheduling training, providing trainee enrollment data, roster collection, verifying training and retention completion, and participating in ETP monitoring activities. The Company also has a designated person in each department to assist with roster collection. Staff is committed to the success of this agreement and will ensure all ETP requirements are satisfied.

FUNDING DETAILS

Location	Substantial Contribution	Level Of Reduction
Pactiv	\$0.00	0.00%

TRAINING PLAN

The following types of training will be provided:

Training Curriculum		
Delivery Method - Type	Training Type	Training Level
Classroom/Simulated Laboratory	Business Skills	
Classroom/Simulated Laboratory	Computer Skills	Standard
Classroom/Simulated Laboratory	Continuous Improvement Skills	

Classroom/Simulated Laboratory	Hazardous Materials Skills	
Classroom/Simulated Laboratory	Management Skills	
Classroom/Simulated Laboratory	Manufacturing Skills (ME)	Standard

Turnover Rate

ETP funds training for stable, secure jobs. Employer's turnover rate cannot exceed 20% for the facility where training is requested, as measured in the 12 months during proposal development.

Turnover Rate		
Location	City	Turnover Rate Percent
Pactiv	Fresno	0.00%

PERFORMANCE

Active Contract

N/A

Prior Performance

Below summarizes Contractor's performance under prior contract(s) completed within the last five years:

Agreement Number: ET11-0149

Location: Kern, Fresno, Los Angeles

Term: 12/20/2010 - 12/19/2012

Approved Amount: \$174,556

Payment Earned: \$167,448 (96%)

Agreement Number: ET14-0263

Location: Fresno

Term: 02/03/2014 - 02/02/2016

Approved Amount: \$46,440

Payment Earned: \$29,580 (64%)

* According to the Company, the poorer-than-expected performance was due to scheduling issues, and failure to track hours. Under this proposal, the Human Resource Representative and staff have an increased knowledge of the ETP program and are dedicated to the administration of this project. This proposal has been "right-sized" consistent with prior earnings.

RECOMMENDATION

For the reasons set forth above, staff recommends approval of this proposal.



**TRAINING PROPOSAL FOR
Phoenix Energy Technologies, Inc.
17-0793**

Delegation Order Date: 09/18/2017
Regional Office: San Diego Regional Office
Analyst Name: Clady, Cassandra
Type of Proposal: Single Employer Contract (SE)
Funding Source: OSC

FUNDING OVERVIEW:

TOTAL ETP FUNDING: \$48,880.00				
Training Cost	Admin Cost	Support Cost	Substantial Contribution	Total In-Kind
\$42,505.00	\$6,375.00	N/A	\$0.00	\$68,689.00

PROJECT PROFILE:

Repeat Contractor:	Yes		
Estimated Number of Trainees:	47	High Unemployment Area:	No
No. of Employees: (Applicant)	State:47 US:87 WorldWide:87	Turnover Rate: (Applicant)	5.00%

Industry Sector(s)	Priority Industry
Professional, Scientific, and Technical	Yes

FUNDING DETAILS:

Funding	Group No.	Attributes	Estimated No. of Trainees	Weighted Average Hours	Reimbursed Rate	Average Cost Per Trainee
OSC	1	S-RET	47	40	\$26.00	\$1,040.00
		Total:	47			

TRAINING PLAN:

Job Title	County of Workplace Location	Estimated Number of Trainees	Training Hours (Min-Max)	Wage Waiver	ETP Min Wage	Base Wage Range	Health Benefits Used	Post Retention Wage
Group #: 1	Attributes: S-RET				Reimbursement Rate: \$26.00			
Administrative	Orange County	5	8-60		\$17.22	\$27.00 - \$35.00	0.00	\$27.00
analytics	Orange County	4	8-60		\$17.22	\$27.00 - \$51.00	0.00	\$27.00
customer service	Orange County	13	8-60		\$17.22	\$17.22 - \$36.00	0.00	\$17.22
owner	Orange County	1	8-60		\$17.22	\$55.00 - \$55.00	0.00	\$55.00
Prod. Mgmt	Orange County	2	8-60		\$17.22	\$42.00 - \$49.00	0.00	\$42.00
Sales/Marketing	Orange County	3	8-60		\$17.22	\$22.00 - \$29.00	0.00	\$22.00
Software Engineers	Orange County	12	8-60		\$17.22	\$50.00 - \$60.00	0.00	\$50.00
Supervisor/Manager	Orange County	7	8-60		\$17.22	\$39.00 - \$68.00	0.00	\$39.00

Legend of Attributes	
Code	Description
S	Single Employer Contract
RET	Retrainee

INTRODUCTION

Founded in 2004 and headquartered in Irvine, Phoenix Energy Technologies, Inc., (Phoenix), seeks ETP funding for retraining.

Phoenix meets the Panel's Out-of-State Competition (OSC) requirements.

Training will be conducted at the following location(s): Irvine, its sole California facility.

Products / Services

Phoenix is an energy management consulting company that diagnoses opportunities and implements strategies to reduce energy consumption costs for its industrial customers. Phoenix also provides strategies that enable customers to become their own energy producers, as well as energy sellers at retail rates.

Customer Base

The Company's primary customer base includes: grocery store chains, pharmacies, universities, and large scale theaters. Many of customer facilities require refrigeration with high energy consumption. Its core clientele are large national retailers.

Prior Project

This will be the third Agreement between Phoenix and ETP, and the third in the last five years.

In the most recent contract, Phoenix was able to provide 34 trainees an average of 50 hours of comprehensive training in: Project Management, Heating Ventilation Air Conditioning, Sales Training, Management Skills and Leadership & Mentoring Skills. This training was designed to allow trainees to improve departmental strategies and product knowledge in order to keep pace with industry demands.

PROJECT DETAILS

Purpose of Training

Overall, technology in the energy field is rapidly evolving. The Company's software developers must continue to stay informed and innovative.

Additionally, the Company has added refrigeration monitoring for its newer restaurant, grocery store and pharmacy clientele. This brings a need to train in new skills since refrigeration carries serious consequences regarding down-time e.g. spoiled food.

The Company also wants to increase new customer base by training Sales & Marketing staff how to solicit new refrigeration customers. It is crucial for the Sales Staff to have product knowledge to compete in the global economy.

Additionally, new types of building control systems and HVAC systems have recently been introduced to the market, which require training for technicians, engineers, customer service teams, data analysts, and the sales force.

TRAINING PLAN

The following types of training will be provided:

Business Skills - Training will be provided to all occupations. Course topics will include Customer Experience, Change Control, Communication, Collaboration, and Business Analysis.

Training will allow trainees to successfully improve departmental strategies, and product knowledge to keep pace with industry and customer demands.

Commercial Skills - Training will be offered to all occupations as it pertains to their specific duties. Training in Fault Detection/Diagnostics Optimization, Refrigeration Controls, Energy Strategy, Grocery Vertical and Retail Vertical. This will enable trainees to stay on the trend with the latest development philosophies and advancements to address opportunities for future programs and services.

Computer Skills- Training will be offered to all occupations as it pertains to their job duties. Course topics include Jira, Amazon Web Services, Mobile Development, IT Infrastructure, Software Design, Security Best Practices, Web Application Development.

Continuous Improvement- Training will be offered to all occupations consistent with their job duties. Course Topics include Efficiency Management, Client Operation and Energy Conservation Measures.

Training Curriculum		
Delivery Method - Type	Training Type	Training Level
Classroom/Simulated Laboratory	Business Skills	
Classroom/Simulated Laboratory	Commercial Skills	Standard
Classroom/Simulated Laboratory	Computer Skills	Standard
Classroom/Simulated Laboratory	Continuous Improvement Skills	

Infrastructure

The Company's Assistant Vice President will oversee all administration, including ensuring that training is scheduled, completed and documented correctly. The Company has also retained Training Funding Source to assist in project administration.

Turnover Rate

ETP funds training for stable, secure jobs. Employer's turnover rate cannot exceed 20% for the facility where training is requested, as measured in the 12 months during proposal development.

Turnover Rate		
Location	City	Turnover Rate Percent
Phoenix Energy Technologies	Irvine	5.00%

SUBCONTRACTOR

Phoenix retained Training Funding Source in Seal Beach to perform Development services for a fee shown below, not to exceed \$2,900. Training Funding Source will also provide Administrative services for a fee listed below, not to exceed 13% of funds earned.

Development		
Subcontractor Name	City	Service Cost
Training Funding Source	Seal Beach	\$2,900.00

Admin		
Subcontractor Name	City	Service Cost
Training Funding Source	Seal Beach	\$5,663.71

PERFORMANCE

Active Contract

NA.

Prior Performance

Agreement No. Location Term Approved Payment Earned%

ET16-0283 Irvine, CA 11/18/15 - 11/17/17 \$41,600 100%

ET-14-0164 Irvine, CA 9/30/13 - 9/29/15 \$49,499 100%

RECOMMENDATION

For the reasons set forth above, staff recommends approval.



TRAINING PROPOSAL FOR

PLM Operations, LLC

17-0556

Panel Meeting Date: 10/27/2017
Delegation Order Date: 09/29/2017
Regional Office: Sacramento Regional Office
Analyst Name: Jana Lazarewicz
Type of Proposal: Single Employer (SB), Small Business Program
Funding Source: Out-of-State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$49,270.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$49,270.00	N/A	\$0.00	\$40,000.00

APPLICANT PROFILE

Company Summary	Headquartered in Modesto, PLM Operations, LLC (PLM Operations) manufactures frozen novelty treats.

Industry Sector(s)	Manufactura; Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 85	US: 87	World Wide: 87
Turnover Rate (Applicant)	12.00 %		
Repeat Contractor	No		

High Unemployment Area	Yes
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	PLM Operations reports increasing demand for its frozen novelty treats. To keep up with this demand, the Company is expanding product lines to include organic ingredients; upgrading software systems; and improving manufacturing processes. Training is needed to provide staff with technological skills and process improvement.
------------------------------	---

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	52	\$ 26.00	35	\$ 910	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	5	\$ 26.00	15	\$ 390	8 - 60

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 2000 and located in Modesto, PLM Operations manufactures frozen novelty treats. Products include ice cream bars, fruit bars, and juice tubes produced in a variety of flavors sold under the brand names of La Michoacana and Coolstix. Products can be found at over 10,000 locations nationwide including grocery stores and convenience stores. The Company's sole location is located in Modesto.

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>PLM Operations recently introduced a new logistics execution software (Teletrac) and upgraded its manufacturing execution software (Wonderware). The training plan will focus on these new software applications.</p> <p>In addition, PLM Operations has designed an extensive training program to increase employee skills on functions and maintenance. Courses will cover wrapper and filler machine operation, production planning, and logistics management. Trainees will also receive Good Manufacturing Practices for FDA quality standards.</p> <p>Retrainee - Job Creation</p> <p>The Company has committed to hiring an additional two Technical and three Production Staff to meet consumer demand. To be eligible for reimbursement under this Group Number, the trainees must be hired into full-time permanent positions within the three-month period prior to Panel approval or during the term of contract.</p>
Training Infrastructure and Administrative Plan	<p>The Company's Human Resources Department will plan, schedule, and oversee all aspects of training. In addition, the Company has retained the services of Prospect Consulting Group, Inc. (Prospect) as an administrative subcontractor.</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 appears below. See *Attachment 2 - Training Delivery and Curriculum Listing* provides for more detail.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
Business Skills: Training will be provided to all occupations to improve soft skills and increase customer satisfaction. Topics will include Customer Service, Sales and Marketing, and Project Management.	
Computer Skills: Training will be provided to all occupations to improve proficiencies using internal software systems. Topics will include Teletrac and Wonderware.	
Continuous Improvement: Training will be offered to all occupations to ensure production quality standards are being met. Topics will include Quality Management and Safe Quality Food.	
Hazardous Materials: Training will be provided to Managers, Production and Technical Staff. Staff will learn the proper procedures for dispensing, handling, storing, and transporting hazardous materials.	
Literacy Skills: Training will be offered to Production Staff in Vocational English. Training will help employees communicate clearly to improve operation of production equipment.	
Manufacturing Skills: Training will be provided to Managers, Logistics, Production, and Technical Staff to increase efficiencies and production knowledge. Topics will include Standard Operating Procedure Improvements, Good Manufacturing Practices, Logistics Management, and Inventory Control.	

4. Additional Company or Training Project Details

4.1 Program Waivers

High Unemployment Area

The 57 trainees in Group Numbers 1 and 2 work in Modesto, a High Unemployment Area (HUA) with unemployment exceeding the state average by at least 25%.

➤ Wage Modification

For these trainees, the Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. The Company is requesting this modification for 31 trainees in Group Numbers 1 and 2 (from \$16.16 per hour to \$12.12 per hour for Group Number 1 and from \$13.22 per hour to \$11.00 per hour for Group Number 2).

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	Prospect Consulting Group, Inc.	San Francisco	\$ 1,940.00
Administrative	Prospect Consulting Group, Inc.	San Francisco	Fee not to exceed 13% of funding 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 training, curriculum and proposal characteristics.

Attachment 1 - Group and Job Title Details

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

Group # 1: Retrainee			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
Stanislaus County/HUA - 2068 Lapham Drive, Modesto (ETP Required Wage: \$12.12)			
Admin/Support Staff (Accountant, Business Analyst, HR, Sales and Marketing)	4	\$18.00 - \$38.46	\$0.00
Logistics Staff 1 (A/R, Logistics, Order Entry, Purchasing)	3	\$13.50 - \$16.15	\$0.00
Logistics Staff 2 (A/R, Logistics, Order Entry, Purchasing)	4	\$16.16 - \$18.00	\$0.00
Managers (Distribution, HR, Logistics, Production, Sales)	7	\$24.03 - \$45.67	\$0.00
Production Staff 1 (Batch Maker, Line Lead, Machine Operator, Packer)	14	\$11.00 - \$16.15	\$0.00
Production Staff 2 (Batch Maker, Line Lead, Machine Operator, Packer)	2	\$16.16 - \$18.50	\$0.00
Technical Staff 1 (Cold Storage, Lab Tech, Maintenance, Raw Materials)	9	\$11.00 - \$16.15	\$0.00
Technical Staff 2 (Cold Storage, Lab Tech, Maintenance, Raw Materials)	9	\$16.16 - \$25.00	\$0.00

Group # 2: Retrainee/Job Creation – Retrainee Initiative Program			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
Stanislaus County/HUA - 2068 Lapham Drive, Modesto (ETP Required Wage: \$10.50)			
JC - Production Staff (Batch Maker, Line Lead, Machine Operator, Packer)	3	\$11.00 - \$18.50	\$0.00
JC - Technical Staff (Cold Storage, Lab Tech, Maintenance, Raw Materials)	2	\$11.00 - \$25.00	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Customer Service
	Financial Reporting
	Project Management
	Sales and Marketing
Computer Skills (Standard)	Teletrac
	Wonderware
Continuous Improvement Skills	Leadership
	Quality Management
	Safe Quality Food
Hazardous Materials Skills	Hazardous Materials Handling
Literacy Skills	Vocational English
Manufacturing Skills (ME) (Standard)	Cleaning and Sanitation
	Filler Machines
	Freezer/Cooler Equipment
	Good Manufacturing Practices
	Inventory Control
	Logistics Management
	Mixers
	Packaging
	Production Equipment Maintenance
	Production Equipment Operations
	Production Planning
	Production Reports
	Recipe and Batch Management
	Silo Machines
	Standard Operating Procedure Improvements
	Tanks
	Wrapper Machines
<i>Delivery Method /Level</i>	<i>E-Learning – Instructor Led/Distance Learning</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Customer Service
	Financial Reporting
	Project Management
	Sales and Marketing
Computer Skills (Standard)	Teletrac
	Wonderware
Continuous Improvement Skills	Leadership
	Quality Management
	Safe Quality Food
Literacy Skills	Vocational English
Manufacturing Skills (ME) (Standard)	Cleaning and Sanitation
	Good Manufacturing Practices
	Inventory Control
	Logistics Management
	Production Equipment Maintenance

Attachment 2 - Training Delivery and Curriculum Listing

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

Manufacturing Skills (ME) (Standard)	Production Equipment Operations
	Production Planning
	Production Reports
	Recipe and Batch Management
	Standard Operating Procedure Improvements

DELEGATION ORDER



**Retrainee - Job Creation
Training Proposal for:
Roorda, Piquet & Bessee, Inc., A Professional
Accountancy Corporation**

Small Business

ET18-0132

Approval Date: October 6, 2017

ETP Regional Office: San Diego

Analyst: K. Hernandez

CONTRACTOR

- Type of Industry: Financial Services
 - Number of Full-Time Employees
 - California: 23
 - Worldwide: 23
 - Number to be trained: 21
 - Out-of-State Competition: Competitors Outside CA
 - Special Employment Training (SET): ☐ Yes ☒ No
 - High Unemployment Area (HUA): ☐ Yes ☒ No
 - Turnover Rate: 13%
 - Repeat Contractor: ☐ Yes ☒ No
- Priority Industry: ☐ Yes ☒ No
- Owner ☒ Yes ☐ No

FUNDING

- Requested Amount: \$16,830
- In-Kind Contribution: \$61,436

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	18	8-60	0	\$770	\$25.00
				Weighted Avg: 35			
2	Retrainee Job Creation	Business Skills, Commercial Skills, Computer Skills	3	8-60	0	\$990	\$25.00
				Weighted Avg: 45			

- Reimbursement Rate: Job #'s 1 & 2: \$22 SB Non-Priority
- County(ies): Riverside
- Occupations to be Trained: Staff Accountant, Senior Accountant, Manager, Partners, Owners
- Union Representation: ☐ Yes
☒ No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: Welsh Advisors in Anaheim assisted with development for a flat fee of \$1,683.
- Administrative Services: Welsh Advisors will also provide administrative services for an amount not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

INTRODUCTION

Founded in 1987 and located in Riverside, Roorda, Piquet & Bessee, Inc., A Professional Accountancy Corporation (RPB) (www.rpbcpa.com) is an accounting and advisory firm that provides tax, audit, accounting and consulting services. RPB's customer base includes companies in distribution, manufacturing, construction, and not-for-profit organizations. This is RPB's first ETP Agreement.

RPB qualifies for standard ETP funding as an accounting and advisory services company facing out-of-state competition as specified under Title 22, California Code of Regulations, Section 4416(i)(1).

Need For Training

RPB creates financial strategies for its clients. Changes in regulations and standards present new challenges, creating a significant need for training to stay current. Specifically, the training will focus on various tax related updates, accounting and auditing updates, financial statement compilation, and financial analysis.

Internal changes have also created a need for training. Over the last 3-5 years, the Company has hired entry-level Staff Accountants, many of which are inexperienced and untrained. As such, it has become crucial for middle-management staff to receive extensive training, in order to mentor the new staff. In addition, as Partners begin considering retirement, middle-management must be trained in leadership and communication skills as required for the partnership track.

Retrainee - Job Creation

The Panel offers incentives to companies that commit to hiring net 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.

RPB has grown its customer base and services over the last two years. This growth has led to the projection of hiring at least three net new full-time Staff Accountants. The driving force behind the staff increase is needed to manage the services of new customers and assist with business development efforts. RPB traditionally hires recent accounting graduates who they can develop and retain long term.

RPB has committed to hiring at least three net new employees (Job Number 2) within the term of this agreement. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into “net new jobs” as a condition of contract.

Top Level Executives

RPB will train Partners (10) and Owners (3) under this ETP project. However, the ETP Small Business Program currently allows top level executives who set company policy to be included for training, of which all Partners fall into this category.

Training Plan

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

Business Skills: Training will be offered to all occupations in leadership, communication, customer service and project management skills. Partners will focus on Marketing Skills to manage RPB’s largest clients that require additional support and attention.

Commercial Skills: Training will be offered to all occupations in skills needed to perform all company services. Trainees will learn industry regulations, new code sections, and changes in legislation that will impact RPB and their clients.

Computer Skills: Training will be offered to all occupations and focus on Quickbooks, Checkpoint Research and Creative Solution. Training will increase efficiency across the company.

Training Infrastructure

RPB has contracted with an administrative subcontractor, Welsh Advisors to assist with ETP project administration. In addition, the Company has designated three staff members to schedule and oversee all training, and collect, audit and submit training rosters to the administrative subcontractor for data entry.

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

- + Leadership Skills
- + Communication Skills
- + Marketing Skills
- + Customer Service
- + Project Management

COMMERCIAL SKILLS

- + Fraud (detection, analysis, review)
- + Best Practices (streamline workload/business practices)
- + Audit Techniques
- + Tax Strategies
- + Affordable Care Act Updates
- + Tax Updates
- + Accounting & Auditing Updates
- + Employee Retirement Income Security Act and Employer Benefit Plans
- + Technical Updates/Procedures
- + Estates and Trusts Procedures
- + Corporate Tax Techniques

COMPUTER SKILLS

- + Quickbooks
- + Microsoft Office
- + Checkpoint Research
- + Creative Solution

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



**TRAINING PROPOSAL FOR
Sila Nanotechnologies, Inc.
17-0852**

Delegation Order Date: 09/19/2017
Regional Office: San Francisco Bay Area Regional Office
Analyst Name: Wang, Samantha
Type of Proposal: Single Employer Contract (SE)
Funding Source: OSC

FUNDING OVERVIEW:

TOTAL ETP FUNDING: \$48,906.00				
Training Cost	Admin Cost	Support Cost	Substantial Contribution	Total In-Kind
\$42,527.00	\$6,379.00	N/A	\$0.00	\$35,000.00

PROJECT PROFILE:

Repeat Contractor:	No			
Estimated Number of Trainees:	57	High Unemployment Area:	No	
No. of Employees: (Applicant)	State:58 US:58 WorldWide:58	Turnover Rate: (Applicant)	1.85%	

Industry Sector(s)	Priority Industry
Professional, Scientific, and Technical	Yes

FUNDING DETAILS:

Funding	Group No.	Attributes	Estimated No. of Trainees	Weighted Average Hours	Reimbursed Rate	Average Cost Per Trainee
OSC	1	S-RET	57	33	\$26.00	\$858.00
Total:			57			

TRAINING PLAN OVERVIEW:

Job Title	County of Workplace Location	Number of Trainees	Training Hours (Min-	Wage Waiver	ETP Min Wage	Base Wage Range	Health Benefits Used	Contract Standard Min Wage
Group #: 1	Attributes: S-RET					Reimbursement Rate: \$26.00		
Administrative I	Alameda	5	8-60		\$17.63	\$30.29 - \$60.10	0.00	\$30.29
Administrative II	Alameda	3	8-60		\$17.63	\$90.09 - \$120.08	0.00	\$90.09
Engineer I	Alameda	16	8-60		\$17.63	\$36.54 - \$61.30	0.00	\$36.54
Engineer II	Alameda	3	8-60		\$17.63	\$61.30 - \$88.94	0.00	\$61.30
Engineer III	Alameda	3	8-60		\$17.63	\$88.94 - \$96.15	0.00	\$88.94
Programmers/IT	Alameda	1	8-60		\$17.63	\$33.65 - \$48.08	0.00	\$33.65
Research Associate	Alameda	13	8-60		\$17.63	\$24.04 - \$43.27	0.00	\$24.04
Research Specialist	Alameda	3	8-60		\$17.63	\$26.44 - \$42.31	0.00	\$26.44
Scientist I	Alameda	7	8-60		\$17.63	\$36.54 - \$61.30	0.00	\$36.54
Scientist II	Alameda	2	8-60		\$17.63	\$61.30 - \$88.94	0.00	\$61.30
Scientist III	Alameda	1	8-60		\$17.63	\$88.94 - \$102.38	0.00	\$88.94

Legend of Attributes	
Code	Description
S	Single Employer Contract
RET	Retrainee

INTRODUCTION

Sila Nanotechnologies, Inc. (Sila Nano) (<http://www.silanano.com>), founded in 2011 and headquartered in Alameda, seeks ETP funding for retraining. Sila Nano designs, researches, and produces engineered materials that increases the energy density of rechargeable Li-ion batteries.

Sila Nano meets the Panel's Out-of-State Competition (OSC) requirements as a company that operates in professional and technical nanotechnology services.

Training will be conducted at the following location(s): Alameda

Products / Services

Sila Nano specializes in Research & Development (R&D) support for other manufacturers. Customers provide the Company with product specifications and pay a lump sum for research, design, and engineering. The Company then develops a prototype (to be reviewed and tested by customers) to determine whether the customer would like to move forward with production.

Customer Base

The Company's customer base includes manufacturers are those in the production of wearable accessories, cellular phones, and electric cars.

PROJECT DETAILS

The Company's 3,000 square feet Alameda facility is almost at capacity with 10 lines of tools and large equipment. The daily production requires 12 to 15 machine operators to produce the R&D materials.

Purpose of Training

Sila Nano seeks funding to train its Engineers, Scientists, and Research staff to continue R&D prototype engineering and development and improve manufacturing processes. Training on skills such as data analysis, material handling, and equipment operations will allow the Company to expand research and manufacturing capabilities and reach a broader range of customers.

Occupations will receive the following training:

- **Computer Skills** - Training is needed for all staff to effectively navigate through the Company's ERP and Quickbase database platforms. Additionally, Engineers, Scientists, Research Associates, and Research Specialists will be trained on .JMP, data analysis software, to effectively analyze data to optimize products and Human Machine Interface (HMI), interface used to create lithium-ion materials, to properly operate this machine.
- **Hazardous Materials** - R&D Engineers, Scientists, Research Associates, Research Specialists, Production Operators, Supervisors, and Managers will receive training to ensure safety and proper use of hazardous materials while in laboratories and on the production floor.
- **Manufacturing Skills** - Training will ensure all Production Operators are well-equipped when operating tools and machines.

TRAINING DETAILS

Location	Substantial Contribution	Level Of Reduction
Sila Nanotechnologies Alameda	\$0.00	0.00%

TRAINING PLAN

Class/Lab and Productive Lab training will be provided at the Alameda facility by qualified internal staff. CBT training will be conducted online with no instructor interactions. The Company's Business Operations Manager, will oversee all training and administrative duties.

LMS

The Company will be using an internal LMS program to document all training hours. The LMS has been used by the company for over two years to track all internal training data. ETP Staff has reviewed and approved the system.

The following types of training will be provided:

Training Curriculum		
Delivery Method - Type	Training Type	Training Level
Classroom/Simulated Laboratory	Computer Skills	Advanced Technology
Classroom/Simulated Laboratory	Hazardous Materials Skills	
Classroom/Simulated Laboratory	Manufacturing Skills (ME)	Standard
E-Learning - Computer Based Training (CBT)	Computer Skills	
Productive Laboratory	Manufacturing Skills (ME)	Advanced Technology
Productive Laboratory	Manufacturing Skills (ME)	Standard

Turnover Rate

Turnover Rate		
Location	City	Turnover Rate Percent
Sila Nanotechnologies	Alameda	1.85%

Advanced Technology

Engineers, Research Associates, Research Specialists, and Scientist will receive this training, delivered by internal subject-matter experts. These occupations will be trained on tools and equipment that will be used during Productive Lab Training.

Advanced Technology Justification

The tools and equipment used for this training were built by in-house Engineers as needed to meet highly specific manufacturing standards. Their usage details training in order to operate and produce a final product and connect to Human Machine Interfaces (HMI). The trainer-to-trainee ratio will not exceed 1:10. Trainers are in-house Engineers who will dedicate their time to training.

Productive Laboratory

Productive Laboratory (PL) training will be provided to the Research Associates, Research Specialists, Engineers, and Scientists to ensure they understand all procedures when operating tools and machines. Trainers are designated Engineers who built the tools.

Trainees will receive no more than 24 hours of PL. Trainees must complete four required steps: 1) reading and understanding Standard Operating Procedures, 2) training by the trainer, 3) operating tools in a production environment while being observed by the trainer, and 4) training the trainer as a test for competency. Completion of the four steps will entail successful completion.

PL will be conducted at a 1:2 trainer-to-trainee ratio. The 1:2 training ratio will allow the Company to fully train employees without disrupting the R&D manufacturing schedule or sequence.

CBT

CBT training will be used to conduct Asana Training, a guide on how to use tools. CBT hours are capped at 50% of total training hours per-trainee.

SUBCONTRACTOR

N/A

PERFORMANCE

Active Contract

N/A

Prior Performance

N/A

RECOMMENDATION

Staff recommends approval of this Proposal.



**TRAINING PROPOSAL FOR
STAGE ONE FINANCIAL, LLC
17-0871**

Panel Meeting Date: 10/27/2017
Regional Office: San Diego Regional Office
Analyst Name: Joe Davey
Type of Proposal: Single Employer (SB), Small Business Program
Funding Source: Out-of-State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$9,680.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$9,680.00	N/A	\$0.00	\$20,000.00

APPLICANT PROFILE

Company Summary	Stage One Financial, LLC (Stage One) provides financial, accounting, and investment services to small, new commercial start-up companies. Services include financial and accounting set-up, business intelligence and analytics, and capital and investment strategies that help small business grow.		
Industry Sector(s)	Professional, Scientific, and Technical		
Priority Industry	No		
No. of Employees (Applicant)	State: 11	US: 28	World Wide: 29
Turnover Rate (Applicant)	0.00 %		

Repeat Contractor	No
High Unemployment Area	No
Unions	N/A

TRAINING PROFILE

Training Objective	Training in financial software, business analytics, and specific financial and accounting skills will help the Company meet client requirements.
---------------------------	--

Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	11	\$22.00	40	\$880	8 - 60

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 2014 and headquartered in Anaheim, Stage One offers finance and accounting solutions; business intelligence and data analytics; and capital and investment strategies. Stage One's services provide clients with a complete view of their business, giving them the financial information and tools to make their own financial decisions. This includes investor knowledge and insight to grow their own business.

All training will be at the Anaheim location and will be provided by in-house experts.

2. Current Training Project Details

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

Purpose of Training	<p>Because the Company serves a broad spectrum of service and product companies, different skill sets are necessary to meet the varying requirements of its clients. For example, one client may sell retail products, which requires specific merchandising, supplier, and inventory solutions to meet their needs. Another client may provide retail services that require different financial solutions to meet their needs.</p> <p>In a service-based company, success is measured by the skills and abilities of its team. Training its employees to better meet the needs of its clients is vital to the Company's future. Training will allow Stage One to retain employees and reward them with good salaries and benefits.</p> <p>Stage One will provide training to its frontline staff on financial software such as Quickbooks, bill.com, and brightpearl among others. Stage One must provide training in specific skills, such as financial statements, financial interpretation and analysis, inventory management, and compliance training in regard to state laws and tax changes.</p> <p>Stage One does not currently have a training budget.</p>
Training Infrastructure and Administrative Plan	<p>The Controller will oversee project administration, including scheduling training, tracking training hours, and ensuring that class/lab rosters are completed correctly.</p>
Marketing Plan (MEC Only)	<p>N/A</p>

PROPOSED TRAINING PROJECT DETAILS

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

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
Accountants will receive class/lab training in Business and Computer Skills (See Attachment 2).	

4. Additional Company or Training Project Details

4.1 Program Waivers

There are no requests for waivers.

4.2 Subcontractor Summary

The applicant has not retained the services of a Subcontractor.

4.3 Previous ETP Project Summary

There are no prior projects.

4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 provide additional details on the training, curriculum, and program characteristics related to this proposed.

Attachment 1 - Group and Job Title Details

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

Group # 1: Retrainee			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
<i>Orange County - 130 S CHAPARRAL CT STE 140, Anaheim (ETP Statutory Standard: \$17.22)</i>			
Accountant	11	\$22.84 - \$38.46	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

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	Meeting of deadlines
	Sales and use tax filings
	Steps to close client's books
	W-4 and W-2 requirements
Computer Skills (Standard)	Brightpearl
	Merging of two systems
	Quickbooks



TRAINING PROPOSAL FOR
Wright Ford Young & Co., Certified Public
Accountants and Consultants, Inc.
17-0782

Panel Meeting Date: 10/27/2017
Delegation Order Date: 10/06/2017
Regional Office: San Diego Regional Office
Analyst Name: Heather Bernard
Type of Proposal: Single Employer (SB), Small Business Program
Funding Source: Out-of-State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$26,840.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$26,840.00	N/A	\$0.00	\$96,458.00

APPLICANT PROFILE

Company Summary	Wright Ford Young & Co., Certified Public Accountants and Consultants, Inc. (WFY) provides accounting, tax estates and trusts and business advisory services.		
Industry Sector(s)	Professional, Scientific, and Technical		
Priority Industry	No		
No. of Employees (Applicant)	State: 80	US: 80	World Wide: 80
Turnover Rate (Applicant)	5.00 %		

Repeat Contractor	Yes
High Unemployment Area	No
Unions	No

TRAINING PROFILE

Training Objective	Training will assist WFY train its Accountants in the newest tax updates, regulatory updates and accounting practices to stay competitive as business expands.
---------------------------	--

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	61	\$22.00	20	\$ 440	8 - 60

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 1973 and headquartered in Irvine, WFY serves customers in real estate, construction, manufacturing, estate planning and employee benefit planning industries. All training will take place in Irvine.

This is WFY's second ETP project, and the second in five years. In the prior project, the Company implemented a formalized training plan and provided technical accounting and tax skills to staff. A major emphasis of training plan was regulatory updates due to the Affordable Care Act (ACA). The Company was able to train many of its newer accountant staff.

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

WFY is expecting to grow by 4-5% in the next 12 months due to new larger-sized customers. WFY plans to hire approximately two new staff in the next 12 months, but is not requesting a Retrainee Job Creation component.

The Company is facing increased competition from firms across the country. This is due, in part, to changing technologies such as GoToMeeting and videoconferencing services that remove the requirement for accounting firms to meet prospective clients in person. As a result, WFY must provide the most up-to-date information and the highest level of customer service. This will require extensive training in all aspects of the industry.

WFY will train its Accountant staff on Internal Revenue Code, revenue recognition rules and changes to the ACA that were not covered in the last ETP project. Training will also be provided in customer service, sales and communication skills. Because the Company provides Business Advisory Services, it is continually working with its staff to refine their soft skills to provide the highest level of customer service, presentation, marketing and leadership skills.

WFY has ongoing software updates for its internal software systems that are updated periodically to meet regulatory changes. As such, WFY will provide training as updates are rolled out.

Finally, WFY will continue to provide training for new Accountant Staff to ensure they are current in industry skills.

PROPOSED TRAINING PROJECT DETAILS

	WFY will be training 13 Partners under this ETP project, some of which may have ownership in the firm. However, the ETP Small Business Program currently allows top-level executives who set company policy to be included for training, of which all the Partners fall into this category.
Training Infrastructure and Administrative Plan	<p>The ETP Project will be overseen by a Partner with assistance from Accounting & Bookkeeping staff. The Company retained Training Refund Group to assist with data entry into ETP's Online System.</p> <p>Training will be delivered by in-house trainers and vendors as needed. The Company represents that no training will be duplicative from the prior project.</p>
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
Training will be provided to Accountants and Partners in various topics listed under these types of training: Business Skills, Commercial Skills and Computer Skills.	

Delivery Method/Level	E-Learning - Instructor Led/Distance Learning
Summary	
WFY is requesting approval to include Instructor Led/Distance Learning to the project for all types of training. The Company expects that this methodology will reduce the training costs. Further it will allow WFY to work with more diverse training vendors who are not located near the Company's Irvine Office. WFY will request prior approval if the training will be provided by vendors located outside of California.	

4. Additional Company or Training Project Details

Certified Public Accountant Certification

Under ETP guidelines, training required for Continuing Education to obtain or maintain a professional

PROPOSED TRAINING PROJECT DETAILS

license is not allowable for reimbursement. WFY has set up internal procedures to track the continuing education hours for all Certified Public Accountants and will only request reimbursement for hours that are not utilized for the maintenance of a license.

4.1 Program Waivers

Request for a Two Year Contract

WFY's busy season runs from January through the end of April every year to accommodate the tax season. As a result, it is expected that very little to no training will occur during this time. The Company is requesting two-year contract term to offset these months.

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or %
Development	Training Refund Group	Anaheim	\$ 3,000.00
Administrative	Training Refund Group	Anaheim	13% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

The table below summarizes performance a prior ETP contract completed within the last five years.

Previous Contract Activity					
Agreement Number	Locations	Term	Approved Amount	Project Earnings	Performance %
ET16-0156	Irvine	8/18/15 – 8/17/17	\$41,272	\$23,259	56%
Notes	Performance was lower than planned because the Company tracked business meetings as training, which did not qualify. WFY has implemented policies and procedures to correct this problem. This proposal has been right-sized to reflect the prior project's earnings.				

4.4 Supporting Panel Proposal Documentation

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

Attachment 1 - Group and Job Title Details

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

Group # 1: Retrainee/Owner			
Job Title	Estimated Number of Trainees	Base Wage Range	Health Benefits Applied
<i>Orange County - 16140 Sand Canyon Ave, Irvine (ETP Statutory Standard: \$17.22)</i>			
Accountant 1	16	\$27.00 - \$32.00	\$0.00
Accountant 2	13	\$32.00 - \$37.00	\$0.00
Accountant 3	15	\$38.00 - \$62.00	\$0.00
Accountant 4	4	\$70.00 - \$80.00	\$0.00
Partner	13	\$90.00 - \$100.00	\$0.00

Note: It will be made a condition of an ETP contract that trainees shall not be paid less than the State of California and/or the applicable local minimum wage rate at the end of the retention. This is regardless of the wage rates expressed in this table.

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 Skills
	Communications Skills
	Leadership Skills
	Marketing Skills
	Presentation Skills
	Sales Skills
	Team Building Skills
Commercial Skills (Standard)	Accounting and Auditing Updates
	Accounting Best Practices
	Employment Retirement Income Security Act
	Fraud Detection
	Tax Updates
	Technical Regulatory Updates
Computer Skills (Standard)	Adobe Acrobat
	Checkpoint Research
	Microsoft Office Intermediate
	QuickBooks

<i>Delivery Method /Level</i>	<i>E-Learning – Instructor Led/Distance Learning</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Client Management Skills
	Communications Skills
	Leadership Skills
	Marketing Skills
	Presentation Skills
	Sales Skills
	Team Building Skills
Commercial Skills (Standard)	Accounting and Auditing Updates
	Accounting Best Practices
	Employment Retirement Income Security Act
	Estates and Trusts
	Fraud Detection
	Tax Updates
	Technical Regulatory Updates
Computer Skills (Standard)	Adobe Acrobat
	CCH software suite
	Checkpoint Research
	Microsoft Office Intermediate
	QuickBooks