

# PANEL PACKET

September 2018



Employment Training Panel



## **NOTICE / AGENDA**

### **MEETING TIME/PLACE**

Friday, September 28, 2018 at 9:30 a.m.  
California Environmental Protection Agency, 1001 I Street  
Sierra Hearing Room, Second Floor  
Sacramento, CA 95814  
Phone: (916) 327-5640

### **AGENDA**

Call to Order by Chair	Barry Broad
<ul style="list-style-type: none"><li>• Roll Call</li><li>• Agenda</li><li>• Minutes</li></ul>	
Report of the Executive Director	Stewart Knox
<ul style="list-style-type: none"><li>• Legislative/Budget/Other</li><li>• Request Motion to Adopt Consent Calendar Projects/Action</li></ul>	
Presentation on STEPS	Lis Testa
Committee Report to Panel	Gretchen Newsom
Review and Action on Proposals	Diana Torres Anna Nastari Jana Lazarewicz
Public Comment on Matters Not on the Agenda	
Agenda Items for Future Meetings	
Public Meeting Adjourns	

Under Government Code section 11123(a), all meetings of a state body are open and public, and all persons are permitted to attend any meeting of a state body, except as otherwise provided in that article. ETP may take action on any item listed in this Notice/Agenda. You can obtain further information about this Notice/Agenda by contacting Michael A. Cable, Legal Counsel, at (916) 327-5422, or [Michael.Cable@etp.ca.gov](mailto:Michael.Cable@etp.ca.gov), or sending a written request to Michael A. Cable, Legal Counsel, at Employment Training Panel, 1100 J Street, 4th Floor, Sacramento, California 95814. Written comments on agenda items should be submitted no later than 12:00 p.m. the business day before the meeting in order to afford adequate time to consider your comments.

This Notice/Agenda of Panel Meeting and related documents are available on the ETP website at [www.etp.ca.gov](http://www.etp.ca.gov). The dollar amounts shown in this Notice/Agenda are estimates only, subject to change up to and including the date of the Panel Meeting. Please continue to access the ETP website for current and updated information. In the event the Panel does not have a quorum at the Panel Meeting noticed herein, then those Panel Members in attendance will meet as a committee at the same time and place identified herein, and said Panel Members in attendance will meet as a committee in order to hear the items identified in this Notice/Agenda, but will not vote or take action. While ETP intends to webcast its meetings, it may not be possible to webcast the entire open meeting due to limitations on resources.

The meeting is accessible to the physically disabled. A person who needs a disability-related accommodation or modification in order to participate in the meeting, including without limitation auxiliary aids or services, may make a request by contacting Michael A. Cable, Legal Counsel, at (916) 327-5422, or [Michael.Cable@etp.ca.gov](mailto:Michael.Cable@etp.ca.gov), or sending a written request to Michael A. Cable, Legal Counsel, at Employment Training Panel, 1100 J Street, 4th Floor, Sacramento, California 95814. Providing your request so that it is received at least five (5) business days before the meeting will help ensure availability of the requested accommodation.

## 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, September 24, 2018 although the Panel may still change the order at the meeting. In regards to those items indicated below as an Amendment, please note that the dollar amount only reflects the proposed amendment amount, and not the total funding amount for the contract.

### North Hollywood Regional Office

AeroVironment, Inc.-----	\$364,000
Ambulanz Health, LLC -----	\$199,680
Beachbody, LLC -----	\$312,000
Burrtec Waste Industries, Inc. (Amendment)-----	\$25,000
Glendale Community College Professional Development Center -----	\$1,760,872
Golden Star Technology, Inc. -----	\$179,400
J & R Film Co., Inc. dba Moviola Education Center -----	\$437,850
Levy Premium Foodservice Limited Partnership -----	\$199,676
Managed Career Solutions, Spc. -----	\$295,939
Medway Plastics Corporation -----	\$93,288
Performance Food Group, Inc.-----	\$217,100
Riviera, Inc. dba The Enterprise U -----	\$949,655
Studio Arts, Ltd. (Amendment)-----	\$348,877
The Mochi Ice Cream Company-----	\$116,480
Vitas Healthcare Corporation of California -----	\$899,080
Workforce Development Corporation of Southeast Los Angeles County, Inc. dba Southeast Los Angeles County Workforce Development Board-----	\$611,566
WWF Operating Company, LLC dba Whitewave Foods Company-----	\$332,800

### San Diego Regional Office

Ajinomoto Foods North America, Inc. -----	\$398,008
AMN Healthcare, Inc.-----	\$93,610
Auto Center Auto Body, Inc. dba Fix Auto -----	\$399,950
Chaffey Community College District-----	\$949,954
Erickson-Hall Construction, Company -----	\$187,200

**San Diego Regional Office** (continued)

In Steps, Inc. -----	\$185,250
Quality Controlled Manufacturing, Inc. -----	\$99,840
San Bernardino Community College District -----	\$1,799,868
Service Champions, Inc. -----	\$304,200
Walter Anderson Plumbing Inc. dba Anderson Plumbing Heating and Air Conditioning -----	\$696,800

**San Francisco Bay Area Regional Office**

Alameda County Electrical Industry Apprenticeship and Training Trust -----	\$695,580
Bay Area Counties Roofing and Waterproofing Industry Apprenticeship Training Fund -----	\$949,386
Castro Valley Health, Inc. dba CVH Home Health Services -----	\$468,000
Genentech USA, Inc. -----	\$650,000
Intuitive Surgical, Inc. -----	\$670,800
Natera, Inc. -----	\$199,290
Sunset Aviation LLC dba Solairus Aviation -----	\$293,300
The Gap, Inc. -----	\$171,120

**Sacramento Regional Office**

A. Teichert & Son, Inc. -----	\$694,980
Bay Alarm Company -----	\$739,700
California Field Ironworkers Apprenticeship Training and Journeyman Retraining Fund – Northern California -----	\$949,786
California Field Ironworkers Apprenticeship Training and Journeyman Retraining Fund – Southern California -----	\$948,818
Rabobank, National Association -----	\$198,030
San Joaquin County Economic Development Association -----	\$312,320
State Center Community College District -----	\$110,088
Tarlton and Son Inc. -----	\$186,030

**PROPOSALS APPROVED**  
**BY DELEGATION ORDER FOR 08/14/18 – 09/17/18**

<b>≤ \$75,000</b>	<b>Approved Date</b>	<b>Approved Amount</b>
<b><u>North Hollywood Regional Office</u></b>		
Certified Aviation Services, LLC	08/14/18	\$68,432
Diamond Technologies, Inc.	08/29/18	\$28,080
Multi Cable Inc.	08/28/18	\$34,320
Scientific Drilling International, Inc.	09/14/18	\$55,770
Seersoft, Inc. dba CA Rehabilitation Specialists	08/17/18	\$65,208
SingerLewak, LLP	09/18/18	\$72,588
<b><u>San Diego Regional Office</u></b>		
Associated Microbreweries, Inc. dba Karl Strauss	09/06/18	\$73,138
Nu Flow America, Inc. dba Specialized Pipe Technologies	09/13/18	\$72,800
Security On-Demand, Inc.	08/14/18	\$74,880
Werner Systems, Inc.	09/13/18	\$73,008
<b><u>San Francisco Bay Area Regional Office</u></b>		
Armanino Foods of Distinction, Inc.	08/29/18	\$10,816
Global Blood Therapeutics, Inc.	09/11/18	\$68,640
YDesign Group LLC	09/14/18	\$74,800
<b><u>Sacramento Regional Office</u></b>		
Art Hild Body and Frame Incorporated dba Hild Collision Center	08/14/18	\$69,160
HWS Baseball IV, LLC dba Modesto Nuts Professional Baseball Club	09/14/18	\$9,360
ICORE International, Inc. dba Zodiac Interconnect US	08/23/18	\$62,400
PGP International, Inc.	08/24/18	\$69,680
R.S.S.E., Inc.	08/21/18	\$5,148
The Sygma Network, Inc.	09/19/18	\$64,220



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# Memorandum

To: Panel Members

From: Stewart Knox  
Executive Director

Subject: **Directions Meeting Sites**

Date September 28, 2018

The Employment Training Panel will meet on **Friday, September 28, 2018 at 9:30 a.m.**

**California Environmental Protection Agency (Cal/EPA)**  
Sierra Hearing Room, 2nd Floor  
1001 I Street, Sacramento, CA 95814

Telephone (916) 327-5640 (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 **11<sup>th</sup> St.**
- Turn Left on **11<sup>th</sup> 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 September 28, 2018

From: Stewart Knox  
Executive Director

Subject: **Future Meeting Sites**

<p><i>September 28, 2018</i></p>	<p><b>California Environmental Protection Agency (Cal/EPA)</b>  <b>Time: 09:30 AM</b>  <b>Sierra Hearing Room, 2nd Floor</b>  <b>1001 I Street, Sacramento, CA 95814</b></p>
<p><i>October 26, 2018</i></p>	<p><b>California Environmental Protection Agency (Cal/EPA)</b>  <b>Time: 09:30 AM</b>  <b>Sierra Hearing Room, 2nd Floor</b>  <b>1001 I Street, Sacramento, CA 95814</b></p>
<p><i>November</i></p>	<p><b>NO PANEL MEETING IN NOVEMBER</b></p>
<p><b>December 7, 2018</b></p>	<p><b>California Environmental Protection Agency (Cal/EPA)</b>  <b>Time: 09:30 AM</b>  <b>Sierra Hearing Room, 2nd Floor</b>  <b>1001 I Street, Sacramento, CA 95814</b></p>



## Employment Training Panel

**STATE OF CALIFORNIA**  
**EMPLOYMENT TRAINING PANEL**  
California Environmental Protection Agency  
1001 I Street  
Sierra Hearing Room, Second Floor  
Sacramento, CA 95814  
August 24, 2018  
(916) 327-5640

### **PANEL MEMBERS**

Barry Broad  
Chair

Janice Roberts  
Vice-Chair

Gloria Bell  
Member

Cheryl Akin  
*Ex-Officio* Member

Gretchen Newsom  
Member

Rick Smiles  
Member

Ernesto Morales  
Member

Ali Tweini  
Member

### **Executive Staff**

Stewart Knox  
Executive Director

Michael A. Cable  
Legal Counsel

**STATE OF CALIFORNIA  
EMPLOYMENT TRAINING PANEL**  
California Environmental Protection Agency  
1001 I Street, Sierra Hearing Room, Second Floor  
Sacramento, CA 95814  
August 24, 2018

**I. PUBLIC PANEL MEETING CALL TO ORDER**

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

**II. ROLL CALL**

Present

Gloria Bell  
Barry Broad  
Janice Roberts  
Ernesto Morales  
Ali Tweini  
Rick Smiles  
Cheryl Akin

Absent

Gretchen Newsom

Executive Staff Present

Stewart Knox, Executive Director

Legal Counsel

Michael A. Cable

**III. AGENDA**

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

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

Motion carried, 7 - 0.

**IV. MINUTES**

It was questioned whether there were any changes and/or additions that need to be made to the Minutes from July 27, 2018. No changes were suggested or made.

ACTION: Ms. Roberts moved and Mr. Tweini seconded the motion that the Panel approve the Minutes from the July 27, 2018 meeting.

Motion carried, 7 - 0.

## **V. REPORT OF THE EXECUTIVE DIRECTOR**

Mr. Knox reported that today's Panel Meeting concerns projects totaling just over \$12.1M, with approximately \$636K in Delegation Orders, for a grand total of just over \$12.7M.

It was reported that the following people were in attendance to present Proposals: Anna Nastari, San Francisco Bay Area Regional Office Manager; Diana Torres, San Diego Regional Office Manager; and Jana Lazarewicz, Sacramento Regional Office Manager.

It was reported, regarding the Budget for Alternative and Renewable Fuel and Vehicle Technology Program (ARFVTP): that ETP is in partnership with the California Energy Commission in regards to \$2M approved through an Interagency Agreement; and that ETP's four (4) ARFVTP proposals in the last few months totaled over \$1M, leaving approximately \$1M remaining for ARFVTP proposals this year.

It was reported, regarding Core Funds for Fiscal Year (FY) 2018/19: today the Panel will consider another \$12.1M with an additional \$636K that upon the Panel approving the just over \$47M in projects for this year, ETP will have approximately \$55.6M for the remainder of FY 2018/19.

It was reported, regarding Delegation Orders: that all such project proposals are capped at \$75K; that all such project proposals are to be approved by the Executive Director on a continuous flow basis; and that the 15 projects subject to Delegation Orders for today's Panel Meeting total just over \$636K.

It was reported, regarding 2018/19 total program funding to date: that approximately 580 projects have been submitted to the Panel, with a value of just over \$100M; and if all project proposals for today's Panel Meeting are funded today, that the Panel will have approved 112 projects, with a value of just over \$47M.

It was reported, regarding applications for contracts that are remaining in the Regional Offices: Single Employer Contract requests are at \$43M in demand, with \$29M in allocation; Multiple Employer Contract (MEC) requests are at \$11M in demand, with \$16M in allocation; Small Businesses requests are at \$4.9M in demand, with \$4.5M in allocation; Critical Proposals are at \$359K in demand, with \$2.6M in allocations; and Apprenticeship programs are at \$3.6M in demand, with \$2.3M in allocation. Overall demand is approximately \$71+M.

It was reported that the number of total projects in FY 2018/19 in the Regional Offices is 257; that the total number of projects currently in the Applications and Assessment Unit is 72; and that the number of total projects is 370.

It was reported that Staff is working hard to get the projects assigned out to the Regional Offices, and that to date about 82% of the projects have been assigned to the Regional Offices.

In order to best utilize resources as we move through the fiscal year, staff is focusing on development of priority projects. This is our standard process. There is no prohibition to funding non-priority projects. Those non-priority projects that are actively being developed

will continue through the process. But, given the volume of pre-applications to be worked, staff is focusing on the projects that meet the Panel's priorities as identified in the Panel's 18/19 Strategic Plan first.

## **VI. LEGISLATIVE UPDATE**

A Legislative Update memorandum was provided to Panel Members. It was reported that there are a lot of bills on Workforce Development and Cannabis; as well as two bills that directly impact ETP:

AB 2420, which adds soft skills training to ETP's legislative mandate. It was reported that ETP remains neutral and does not oppose AB 2420.

## **VII. MOTION TO ADOPT CONSENT CALENDAR PROJECTS**

Mr. Broad asked whether there was any discussion needed in regards to a motion to adopt the consent calendar projects.

Chairperson Broad asked for a motion to adopt Consent Calendar Items #1 through #14.

Aire-Rite Air Conditioning & Refrigeration Inc.	\$130,000
Asian Business Association San Diego	\$ 22,240
Cablecom, LLC	\$163,800
California Family Foods, LLC	\$ 99,450
Chilton and Leste Management, Inc.	\$135,200
Gagne Brothers Enterprises dba Ben Franklin Plumbing	\$150,098
Gilmore Heating & Air Conditioning, Inc.	\$199,914
Marcum, LLP	\$119,914
Murrieta Chamber of Commerce (AMENDMENT)	\$197,325
rPlanet Earth Los Angeles, LLC	\$150,436
Simpson Strong-Tie Co., Inc.	\$ 42,750
Southwest Boulder & Stone, Inc.	\$ 81,900
Stanislaus Business Alliance, Inc.	\$129,838
Trace3, LLC	\$198,900

**ACTION:** Ms. Roberts moved and Ms. Bell seconded the motion to approve the consent calendar for Items #1 through # 14.

Motion carried, 7 – 0.

## **VIII. REPORT OF GENERAL COUNSEL**

Mr. Cable provided a legal report, explaining to the Panel that the Legal Unit is currently conducting a comprehensive review of ETP Legislation and Regulations. Mr. Cable explained that this comprehensive review is the result of receiving suggestions and recommendations internally and from the public regarding ways in which we can improve the ETP Program; making it a more cost efficient and cost effective program. Mr. Cable explained that this project will take a significant amount of time and effort, and discussed how committee meetings will be used for discussing and vetting potential changes.

Mr. Broad asked whether there were any questions by Panel Members. Hearing none, Mr. Broad discussed the fact that it's been a long time since such a review was conducted, and explained how modern technology and other issues have increased the need for such a comprehensive review at this time.

## **IX. REVIEW AND ACTION ON PROPOSALS**

### **Single Employers**

#### **Tab #15 – CHLB, LLC dba College Medical Center**

Ms. Torres presented a proposal on behalf of CHLB, LLC dba College Medical Center (College Medical Center) in the amount of \$390,000. Founded in 1932, College Medical Center is a full-service, community teaching hospital based in Long Beach, California. The hospital was purchased by College Health Enterprises, Inc., a Santa Fe Springs-based healthcare management company, in October 2013. At that time, it was renamed College Medical Center. This purchase joined the hospital with College Hospital Cerritos and College Hospital Costa Mesa as affiliates of College Health Enterprises.

College Medical Center has 284 beds and serves patients in the communities of Long Beach, Signal Hill, Lakewood, Carson, Hawthorne, Lawndale and Inglewood. The organization offers services in the areas of behavioral health, cardiopulmonary, epidemiology/infection control, emergency care, family health, intensive care, laboratory, nursing, partial hospitalization, prenatal/OB, pharmacy, physical therapy, radiology, and surgery. College Medical Center also operates residency programs in family medicine, internal medicine, and traditional rotating internships. The hospital has a 36-month medical residency training program. Residencies are accredited by the American Osteopathic Association. This will be College Medical Center's first ETP project.

Ms. Torres introduced Michael Melendrez, Director, Human Resources, CHLB; and Bill Sacks, National Training Company.

Mr. Tweini asked whether this project consists of all retrainees.

Mr. Melendrez explained that they are continuing to retrain, but in areas such as detox and ER, their plan is to expand and create new jobs.

Mr. Tweini asked about veteran participation.

Mr. Melendrez explained that they actively recruit and hire veterans, and explained that he was a Vietnam veteran.

Mr. Tweini expressed a desire to see a statement regarding veteran participation in the proposals that become before Panel.

**ACTION:** Ms. Bell moved and Ms. Roberts seconded the motion for approval of the proposal for CHLB, LLC dba College Medical Center, in the amount of \$390,000.



Motion carried, 7 - 0.

### **Tab #16 – Procore Technologies, Inc. (Critical Proposal)**

Ms. Torres presented a proposal on behalf of Procore Technologies, Inc. (Procore), in the amount of \$899,808. This is a Critical Proposal developed in conjunction with the Governor's Office of Economic and Business Development GO-Biz). This project has been designated as a Critical Proposal by GO-Biz because of the company's continuous expansion efforts (212 newly-created positions) in its California facilities.

Founded in 2003 and headquartered in Carpinteria, Procore is a construction management software company. With an award-winning suite of project management tools, over a million registered Procore users across the globe manage all types of construction projects including industrial plants, office buildings, apartment complexes, university facilities and retail centers. The company serves clients in commercials, industrial, multifamily, residential, and transportation industries in the United States and internationally. Procore has locations in California, Texas, Oregon, New York, Canada, and Australia. The proposed training will be provided to employees in its California locations in Carpinteria, San Francisco, and San Diego. This will be Procore's third ETP Agreement and third within the last five years.

Ms. Torres introduced Michelle Greer, Vice President of People, Procore; Gregory Gills, Senior Director of Learning & Development, Procore; and Kim Edelman, Executive Director, Glendale Community College.

Mr. Roberts expressed her appreciation and excitement for the project proposal.

**ACTION:** Ms. Roberts moved and Ms. Bell seconded the motion to approve the proposal for Procore Technologies, Inc., in the amount of \$899,808.

Motion carried, 7 - 0.

### **Tab #17 – Viasat, Inc.**

Ms. Torres presented a proposal on behalf of Viasat, Inc. (Viasat), in the amount of \$301,236. Located in San Diego, Viasat designs, engineers, and produces a line of commercial and governmental satellite networking communications systems. The products, called Very Small Aperture Terminals or VSAT, provide communication links between ground-based and satellite communication devices. The company's innovative satellite and various digital communication products enable fast, secure and efficient communications to any location and are used by both commercial and government sectors. This is the company's fifth ETP training proposal, the second in the last five years.

Ms. Torres introduced Jaclyn Konoske, Manager of Learning and Development.

Mr. Tweini asked and confirmed that Viasat has been before the Panel before now.

Mr. Tweini asked and confirmed that Viasat has its own training program, which is part of a Learning and Development Team.

**ACTION:** Ms. Bell moved and Ms. Roberts seconded motion to approve the proposal for Viasat, Inc., in the amount of \$301,236.

Motion carried, 7 - 0.

**Tab #18 – United Parcel Service, Inc.**

Ms. Torres presented a proposal on behalf of United Parcel Service, Inc. (UPS), in the amount of \$308,334. Headquartered in Atlanta, GA, UPS is a global leader in logistics, offering a broad range of solutions including transportation of packages and freight, facilitation of international trade, and deployment of advanced technology. UPS also provides industry-specific customer solutions in healthcare and e-commerce. The company services more than 200 countries and territories, worldwide. The company has approximately 105 California locations and over 21,216 full-time California workers.

In 2017, overall volume increased across all products for the company, with e-commerce representing an ever increasing percentage of total growth. Business-to-Consumer shipments represented 5-% of the total US domestic package volume. In addition, the company has added Saturday operations domestically, covering 50% of the US population. The company expects to expand in 2018 to cover 60% of the population with six-days-a-week deliveries. Expansion efforts nation-wide are expected to cost approximately \$7 billion over the next three years. In California, the cost is expected to be approximately \$1.9 billion.

Ms. Torres introduced Shane Simpson, Western Region Tax Director.

Mr. Broad asked how UPS is going to fix the problem of past poor performance.

Mr. Simpson explained that they conducted a review and analysis of what caused past poor performance, and noted that past poor performance was generally caused by part time drivers not staying long enough to qualify. They have worked with HR and with an Integrad Management Team, which should remedy the past performance issues.

Mr. Broad stated that this is an issue, and does not want to see the past poor performance again. Mr. Broad stated that the pressure is on to improve performance.

Ms. Roberts echoed the same performance concerns as Mr. Broad, and Ms. Roberts explained that she is worried that there are tax people in charge of this training.

Mr. Simpson explained that his department is in charge of submitting documentation for payment, but that there are UPS trainers on site; with four supervisors and one manager.

There was some general conversation about UPS training, and Mr. Broad ended the conversation by commenting how California appreciates UPS, and how the Panel wants UPS to succeed with this project.

**ACTION:** Ms. Roberts moved and Mr. Tweini seconded the motion for approval of the proposal for United Parcel Service, Inc., in the amount of \$308,334.

Motion carried, 7 - 0.

## **Tab #19 – K.W.P.H. Enterprises dba American Ambulance**

Ms. Lazarewicz presented a proposal on behalf of K.W.P.H. Enterprises dba American Ambulance, (American Ambulance), in the amount of \$599,248. Founded in 1975 and headquartered in Fresno, American Ambulance provides emergency and non-emergency ambulance transportation in Fresno and Kings Counties. Services range from emergency and non-emergency response transportation, disaster response and event medical services. The company's customers include hospitals, healthcare systems, and local and state government entities. This is American Ambulance's first ETP contract. Training will be conducted at the company's Fresno, Madera, Kings and Tulare locations.

Ms. Lazarewicz introduced Bob Adams, Director of Human Resources; and Tashiana Jackson, Project Manager, Corporate Tax Incentives.

Ms. Roberts complimented ETP staff in having almost 80% new contract proposals this meeting.

Ms. Roberts asked whether they have the infrastructure to support a \$600K project.

Mr. Adams explained how their infrastructure includes HR tracking the training and working with other departments; and that their tracking system has been around for years, and is basically ready to go.

Ms. Roberts asked whether the training includes drivers?

Mr. Adams stated that they do not have drivers per se, but that driving is part of the EMT ambula-paramedic essential duties.

Ms. Roberts asked how they coordinate times for training.

Mr. Adams recognized that training can be a logistical nightmare with people who work a scheduled 24-hours shift. However, Mr. Adams explained how they set aside 6 to 8 training days over a 2-week period as one way of addressing these issues.

Ms. Roberts suggested that they stick close to their consultant and ETP staff.

Mr. Broad asked whether employees get paid while on call.

Mr. Adams assured Mr. Broad that such employees are on the clock.

Mr. Tweini asked about veteran participation in this project.

Mr. Adams stated that they have a good number of veterans that work for the company; their CEO is a veteran; their Director of Operations is a veteran; and about 45 or so field employees are veterans.

**ACTION:** Ms. Roberts moved and Mr. Tweini seconded the motion for approval of the proposal for K.W.P.H. Enterprises dba American Ambulance, in the amount of \$599,248.

Motion carried, 7 - 0.

### **Tab #20 – O’Neill Beverages Co., LLC**

Ms. Lazarewicz presented a proposal on behalf of O’Neill Beverages Co., Inc. (OBC), in the amount of \$241,150. Founded in 2004 and headquartered in Larkspur, OBC is a family-owned and operated winery and distillery specializing in the production and distribution of bulk wine, brandy and spirits. OBC is the 7<sup>th</sup> largest winery in California with approximately 7,000 acres of vineyards throughout the State. OBC’s customer base includes retailers and restaurants throughout the United States. This will be OBC’s first ETP Agreement. Training will be conducted at OBC’s locations in Larkspur, Parlier and Paso Robles.

Ms. Lazarewicz introduced Theresa Parra, JD/MBA, SPHR, Director of Human Resources; and Mike Snead, Consultant.

No questions from the Panel.

**ACTION:** Ms. Roberts moved and Ms. Bell seconded the motion for approval of the proposal for O’Neill Beverages Co., LLC, in the amount of \$241,150.

Motion carried, 7 - 0.

### **Tab #21 – SAFE Credit Union**

Ms. Lazarewicz presented a proposal on behalf of SAFE Credit Union (SAFE), in the amount of \$408,595. Founded in 1940 and headquartered in Folsom, SAFE provides financial services such as personal banking, business banking and wealth management. The company primarily focuses on personal and business loan portfolios. SAFE is a non-profit organization that serves over 180,000 members living in Northern California. The company also works directly with clients such as SMUD, UC Davis, CalFit, and Dignity Health to provide their employees with financial wellness services and advertisement. Training will take place at all 22 locations with the Folsom location participating as the lead facility. Locations of training include Antelope, Citrus Heights, Folsom, Elk Grove, Sacramento, Granite Bay, Fair Oaks, Lincoln, McClellan Park, Pleasant Hill, Rancho Cordova, Roseville, North Highlands, and West Sacramento.

Ms. Lazarewicz introduced Jenny Santos, Assistant Vice President Employee Services; and Brenda Bielski, Employee Services Coordinator.

Ms. Roberts noted that past performance was poor; noted that this project has been right-sized; and asked whether this project was going to be at the Folsom location or the 22 locations.

Ms. Santos stated at all locations.

Ms. Roberts explained how 22 locations is harder than 1 location, and expressed concern whether this project will be successful given there’s no consultant or anyone assisting with this project.

Ms. Bielski explained that the training will be condensed to three locations; they have a Call Center now to assist; they now have 7 trainers in their Education and Development Unit, plus a manager; and they have extended their CBT Training and LMS System in order to improve performance.

Ms. Roberts expressed concern that she is not convinced that this project will be successful, and asked about the LMS System.

Ms. Bielski stated that she understands Ms. Roberts' concerns, but explained that they have a new upgraded LMS System; new people to assist; and they have spent over \$100K on software to resolve issues.

Ms. Roberts suggested that they evaluate their project performance about a year into the project, and if they feel they are not on track, then they should consider hiring a consultant in order to get the project on a successful track completion.

Ms. Bielski stated she appreciated and understood the suggestion.

Mr. Broad inquired about the reason for past poor performance, and Ms. Bielski explained that they probably asked for too much the last time.

Mr. Tweini thanked them for their work as a credit union.

**ACTION:** Mr. Tweini moved and Mr. Smiles seconded the motion for approval of The proposal for SAFE Credit Union, in the amount of \$408,595.

Motion carried, 7 – 0.

### **Tab #22 – Sunergy California, LLC (Critical Proposal)**

Ms. Lazarewics presented a proposal on behalf of Sunergy California, LLC (Sunergy), in the amount of \$541,060. Sunergy is designated as a "Critical Proposal," as defined in Title 22, California Code of Regulations (CCR) 4402.2. Sunergy is expanding its facility and workforce from China to California due to the rapid growth within the industry. This project will assist Sunergy to develop new skills for newly hired and incumbent workers.

Founded in 2017 and headquartered in Sacramento, Sunergy is a subsidiary of China Sunergy Co., a Chinese based manufacturing company that specializes in the production of Photovoltaic (PV) cells and modules. PV converts concentrated sunlight directly to electricity via a photovoltaic effect (the creation of voltage or electric current in a material upon exposure to light). With the company's continued success in China, Europe and other parts of the world, Sunergy decided to expand its business into the United States and establish a facility in Sacramento. This will be Sunergy's first ETP Agreement. Training under this proposal will be for its Sacramento location.

Ms. Lazarewicz introduced Kate Ding Mayfield, Human Resources Manager; and Keith Brama, President of Propel Consulting Group.

Ms. Roberts asked whether they install as well as produce solar panels.

Ms. Ding-Mayfield stated that they do not perform installation, and that their customers are engineering procurement contractors.

Ms. Roberts asked whether they have receive federal funding.

Ms. Ding-Mayfield explained that they have applied for income credits, but they have not receive any grants or similar funding.

Ms. Akin, Mr. Broad, and Mr. Tweini thanked the company for deciding to make California the location for its U.S. facility.

**ACTION:** Mr. Broad moved and Ms. Roberts seconded the motion for approval of the proposal for Sunergy California, LLC, in the amount of \$541,060.

Motion carried, 7 - 0.

### **Multiple Employer Contracts**

#### **Tab #23 – Brand Consulting Group, LLC dba Brand College**

Ms. Torres presented a proposal on behalf of Brand Consulting Group, LLC dba Brand College (Brand College) in the amount of \$949,151. Founded in 2004, Brand College is a training agency that provides Information Technology (IT) courses designed to help IT professionals and businesses succeed in today's technology-driven environment.

Brand College is dedicated to facilitating the career development of highly qualified professionals trained to design, implement, and maintain information systems. Participating employers qualify as high-tech companies, software publishing, broadcasting, internet publishing, web hosting/search portals, telecommunications, and other companies facing out-of-state competition. This proposal will also utilize Special Employment Training (SET) funds for frontline workers who earn at least the Statewide Average Hourly Wage in businesses that do not face out-of-state competition.

Ms. Torres introduced Debbie Ruiz, Director.

There were no questions from the Panel.

**ACTION:** Ms. Roberts moved and Ms. Bell seconded the motion for approval of the proposal for Brand Consulting Group, LLC dba Brand College in the amount of \$949,151.

Motion carried, 7 - 0.

#### **Tab #24 – Inland Boatmen's Union of the Pacific Joint Apprenticeship Committee Trust**

Ms. Torres presented a proposal on behalf of Inland Boatmen's Union of the Pacific Joint Apprenticeship Committee Trust (JAC), in the amount of \$263,050. Founded in 1918, the JAC is the marine based division of the International Longshore Warehouse Union (ILWU). In Southern California, most members of the union work on tug boats that escort ships into,

and out of, the Los Angeles/Long Beach harbors, fuel oil barges, that fuel ships for their next voyage, and in marine construction assisting in dredge operations.

The JAC and its signatory employers created a new apprenticeship program, registered with the Division of Apprenticeship Standards, to provide structured training to apprentice and journeymen Merchant Mariner/Seaman in Southern California. The apprentice program is two years in length and includes 440 hours of related and supplemental instruction. Apprentices earn while they learn, making progressively higher wages as they advance through the program. The first apprentices will begin training at the JAC's new training center in San Pedro this summer. This training center was created with the help of a local education agency (Los Angeles Unified School District).

Ms. Torres introduced Oscar Meier, Teacher Advisor with LAUSD; and Steve Duscha, Consultant.

Mr. Morales expressed his thanks and appreciation for the work they do in San Pedro.

Mr. Tweini expressed his thanks and appreciation for the work they do.

Ms. Roberts expressed her thanks and appreciation for the project, and clarified that they also do work for the cruise ships.

Ms. Bell asked how they found out about ETP.

Mr. Meier explained that he's being doing ETP contracts with Steve Duscha for about 12 years, and this is a project they talked about doing.

Mr. Duscha commented further, noting that Mr. Meier runs the apprenticeship programs for the Los Angeles Unified School District, and that apprenticeship is a lifelong passion for Mr. Meier.

**ACTION:** Ms. Bell moved and Mr. Morales seconded the motion for approval of the proposal for Inland Boatmen's Union of the Pacific Joint Apprenticeship Committee Trust in the amount of \$263,050.

Motion carried 7 - 0.

### **Tab #25 – Los Angeles & Orange Counties Air Conditioning and Refrigeration Joint Journeyman and Apprenticeship Training Committee**

Ms. Torres presented a proposal on behalf of Los Angeles and Orange Counties Air Conditioning and Refrigeration Joint Journeyman and Apprenticeship Training Committee (JJATC), in the amount of \$948,124. The JJATC was founded in 1949 by a consortium of labor and management organizations to provide training for air conditioning and refrigeration technicians in Southern California. The JJATC administers a training trust fund created through collective bargaining and funded by signatory employers. This will be JJATC's fifth ETP Agreement, and the fourth within the last five years.

Ms. Torres introduced Jon Newbro, Training Coordinator with JJATC; and Steve Duscha, Consultant.

Mr. Tweini asked about veteran participation.

Mr. Newbro discussed their veteran participation, and their work with the United Association of Veterans and Helmets to Hardhats.

Ms. Roberts asked about what warrants the repeat requests for increased funding.

Mr. Duscha explained how the increases are the result of increases in the fixed fee rate. In other words, they are going up to the max now.

Ms. Roberts thanked Mr. Duscha for the explanation.

**ACTION:** Ms. Roberts moved and Ms. Bell seconded the motion for approval of the proposal for Los Angeles and Orange Counties Air Conditioning and Refrigeration Joint Journeyman and Apprenticeship Training Committee in the amount of \$948,124.

Motion carried, 7 - 0.

### **Tab #26 – Southern California Floor Covering Crafts Joint Apprenticeship Training Committee**

Ms. Torres presented a proposal on behalf of Southern California Floor Covering Crafts Joint Apprenticeship & Training Committee (So Cal Floor), in the amount of \$350,830. So Cal Floor is responsible for training approximately 200 apprentices and 320 journeymen. So Cal Floor was founded in 1953, pursuant to the collective bargaining agreement between Carpet, Linoleum, and Soft Tile Local Union 1247 (of the Brotherhood of Painters, Decorators and Paperhangers of America) and the Floor Covering Contractors Association of Orange County, Harbor Floor Covering Institute, and San Gabriel Valley Floor Covering. This will be So Cal Floor's fifth ETP Agreement.

So Cal Floor's headquarters and training center are located in Santa Fe Springs. The JATC serves both large and small companies and workers in the Los Angeles, Orange, Kern, Inyo, Mono, Riverside, San Bernardino, Ventura, Santa Barbara and San Luis Obispo Counties. All trainees are represented by Local 1247.

Ms. Torres introduced David Burtle, Director of Training; Oscar Meier, Teacher Advisor, LAUSD; and Steve Duscha, Third Party Administrator.

There were no questions from the Panel.

**ACTION:** Ms. Roberts moved and Mr. Tweini seconded the motion for approval of the proposal for Southern California Floor Covering Crafts Joint Apprenticeship & Training Committee in the amount of \$350,830.

Motion carried, 7 - 0.



## **Tab #27 – Southern California Sheet Metal Joint Apprenticeship and Training Committee**

Ms. Torres presented a proposal on behalf of Southern California Sheet Metal Joint Apprenticeship and Training Committee (SoCal Sheet Metal JATC) in the amount of \$948,480. Formed in 2003, the SoCal Sheet Metal JATC provides training for Apprentice and Journey sheet metal workers for seven Southern California counties. In the past, two different apprenticeship committees served the Southern California region (Sheet Metal Workers International Association, Local 105 JATC and Air Conditioning Sheet Metal Association, Orange Empire JATC). After 2007, these committees were consolidated into one. Signatory employers are represented on the Committee through the Sheet Metal and Air Conditioning Contractors National Association (SMACNA) and Sheet Metal, Air, Rail, Train International Association (SMART). This will be the sixth ETP Agreement with SoCal Sheet Metal, JATC.

Ms. Torres introduced Lance D. Clark, Apprenticeship Administrator; Oscar Meier, Training Advisor, LAUSD; and Steve Duscha, Third Party Administrator.

Mr. Tweini expressed his thanks and appreciation for the project.

**ACTION:** Mr. Tweini moved and Ms. Roberts seconded the motion for approval of the proposal for Southern California Sheet Metal Joint Apprenticeship & Training Committee in the amount of \$948,480.

Motion carried, 7 - 0.

## **Tab #28 – Southern California Surveyors Joint Apprenticeship Committee**

Ms. Torres presented a proposal on behalf of the Southern California Surveyors Joint Apprenticeship Committee (SCSJAC), in the amount of \$314,750. Established in 1960 and headquartered in Rancho Cucamonga, the SCSJAC provides Apprentice and Journeyman Surveyors training throughout 12 counties in Southern California. It is administered jointly by the Southern California Association of Engineers and Land Surveyors. The International Union of Operating Engineers, Local 12 (Union). SCSJAC has secured 100 signatory companies that include engineering, surveying, and construction firms.

This will be SCSJAC's fourth ETP Agreement, the third within the last five years. In this proposal, training will continue for Apprentices and Journeymen. Training includes surveying equipment, survey procedures, surveying practices, surveying computations, advanced coordinate geometry, plan reading, and laptop surveying/aerial photogrammetry.

Ms. Torres introduced Raymond Diaz, Administrator; and Jaqueline Heredia, Office Manager.

There were no questions from the Panel.

**ACTION:** Ms. Roberts moved and Mr. Tweini seconded the motion for approval of the proposal for Southern California Surveyors Joint Apprenticeship & Training Committee in the amount of \$314,750.

Motion carried, 7 - 0.

## **Tab #29 – Jewish Vocational and Career Counseling Services**

Ms. Nastari presented a proposal on behalf of Carpenters Jewish Vocational and Career Counseling Services (JVS), in the amount of \$337,646. Founded in 1973 and headquartered in San Francisco, JVS operates a wide range of employment and training programs. These programs and services help its clients with multiple barriers acquire the skills to become self-sufficient individuals and find jobs. JVS provides job search and job readiness training, and job placement and career counseling services. In addition, it delivers specialized vocational training programs that help unemployed and underemployed people. ETP training will be delivered out of its San Francisco headquarters serving the Bay Area's San Francisco, Marin, Contra Costa, San Mateo Alameda and Santa Clara counties. This is JVS' fifth ETP Agreement, and the second in the last five years.

Ms. Nastari introduced Lisa Countryman, Vice President of Planning and Program Development; and Abby Snay, Chief Executive Officer; and Steve Duscha, Consultant.

Ms. Roberts thanked them for this project and especially for serving people with multiple barriers. Ms. Roberts then discussed right-sizing, and explained that in order to be consistent with other contracts, she is suggesting a 20% reduction of this contract.

Mr. Tweini expressed his thanks and appreciation for his project involving people with multiple barriers.

**ACTION:** Ms. Roberts moved and Mr. Smiles seconded the motion to reduce the proposal for Jewish Vocational and Career Counseling Services by 20%, making the amended amount \$270,117.

Motion carried, 7 - 0.

## **Tab #30 – San Mateo County Electrical Joint Apprenticeship and Training Committee**

Ms. Nastari presented a proposal on behalf of San Mateo County Electrical Joint Apprenticeship and Training Committee (SMJATC), in the amount of \$905,955. Founded in 1947, the SMJATC is located in San Carlos. SMJATC is governed by a Board of Trustees comprised of four labor and four management representatives, and is a joint effort of the International Brotherhood of Electrical Workers (IBEW) Local 617 and the National Electrical Contractors Association (NECA). This will be SMJATC's sixth ETP Agreement.

Ms. Nastari introduced Kathleen Barber, Training Director; and Jan Borunda, Project Coordinator, Cal Labor Fed.

Mr. Tweini noted that he saw the number of veterans in the proposal, and wanted to express his thanks and appreciation for assisting veterans.

**ACTION:** Mr. Tweini moved and Ms. Bell seconded the motion for approval of the proposal for San Mateo County Electrical Joint Apprenticeship and Training Committee in the amount of \$905,955.

Motion carried, 7 - 0.

## **Tab #31 – Sheet Metal Workers’ Local No. 104 and Bay Area Industry Apprentice and Journeyman Training Fund**

Ms. Nastari presented a proposal on behalf of Sheet Metal Workers’ Local No. 104 and Bay Area Industry Apprentice and Journeyman Training Fund (Sheet Metal Trust), in the amount of \$1,612,671. The Sheet Metal Trust is an “umbrella trust” fund created through a collective bargaining agreement (CBA) between Local 104 and the Bay Area Association of Sheet Metal Contractors (Bay Area Contractors). The Trust oversees four training centers that serve 17 counties in Northern California assisting some 7,000 union members and approximately 285 signatory employers. This will be the seventh ETP Agreement with Sheet Metal Trust, the fourth in the last five years. This is the third time Veterans have been introduced as a distinct cohort of Apprentice trainees.

Ms. Nastari introduced Benjamin A. Rivera, Administrator; and Jan Borunda, Project Coordinator, Cal Labor Fed.

There were no questions from the Panel.

**ACTION:** Ms. Roberts moved and Mr. Tweini seconded the motion for approval of the proposal for Sheet Metal Workers’ Local 104 and Bay Area Industry Apprentice and Journeyman Training Fund in the amount of \$1,612,671.

Motion carried, 7 - 0.

### **X. PRESENTATION BY LIS TESTA**

Ms. Testa introduced today’s topics: the Broker Model, and a new proposed training vendor limitation.

Ms. Testa explained that currently, we have a rule called the Broker Model Pilot. This item was discussed at Committee in March and Committee voted to remove the Broker Model and bring that motion before the Panel, which is what is occurring today. Ms. Testa reminded the Panel that the Broker Model limits any given training vendor on a project only delivering 50% of the training on a project. There are other ways to apply the Broker Model, but those are not feasible for staff to do. The model has not worked as it was intended, and this is why there is a request to remove it. Ms. Testa went on to explain that there was still some concern over removing it and it was suggested to put something in its place. What the Committee is proposing to put in place of the Broker Model is a training vendor limitation. This item was brought to Committee in June and Committee voted to bring it to Panel. What the Committee is proposing is to limit any training vendor to receive only costs from delivering training so that a training vendor would not be allowed to receive any development, administration, or support costs. This would not affect any of the other kind of subcontractors that ETP has. This is a limitation only on training vendors themselves. Committee would like to have exempted from this Rule any training vendor that is already accredited or approved through WASC, ACCJC or the BPPE. Those are different agencies that approve two and four year colleges and public more private training agencies. The Committee would also like to be able to allow anyone to request an exemption with Executive Staff if they would like one.

Ms. Testa asked if there were any questions or comments from Panel members before requesting these two motions.

Ms. Roberts provided more clarification for newer Panel Members, noting that the effort is partly in order to eliminate the presence of “pass through organizations” that are not providing anything more than merely holding the contract, without direct accountability to the vendors.

Ms. Testa said she would like to request two motions: the first motion being to remove the Broker Model Pilot effective immediately as recommended by Panel’s Committee; and the second motion would be to institute the training vendor limitation with the exemption of WASC, ACCJC, and BPPE approved entities, and that those training vendors on a contract would only be allowed to receive costs for delivering training and not allowed to receive development, administration, or support costs, with the ability to ask for an exemption, if needed.

Mr. Broad as for any questions or public comments on either of the motions. Hearing none, Mr. Broad proceeded to the motions.

**ACTION:** Mr. Broad moved and Ms. Bell seconded the motion to remove the Broker Model Pilot program.

Motion carried, 7 - 0.

**ACTION:** Mr. Broad moved and Mr. Tweini seconded the motion to limit training vendors, with the exception of those that are WASC, ACCJC, and BPPE approved entities and those training vendors who have received an exemption on a case-by-case basis, by Executive Staff to only receive payment for training delivery services and not to allow training vendors to receive any development, administration, or support costs from the ETP contractor they are subcontracted with.

Motion carried, 7 - 0.

## **XI. GENERAL PUBLIC COMMENT**

No comments from the general public.

## **XII. MEETING ADJOURNMENT**

Meeting adjourned at 11:37 a.m.

## Single Employer Contractor

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

- Unless funded under Special Employment Training (SET), a single employer must face out-of-state competition.
- A single employer must be subject to the Employment Training Tax.
- The employer must also make an “in kind” contribution toward the cost of training, as follows: 1) 100 or fewer employees, at least 50% of the ETP-funded amount; 2) more than 100 employees, at least 100% of the ETP-funded amount.
- The employer must provide union letters of support for employees who are represented. The employer should also be able to show how the training will enhance job security and improve opportunities for advancement.
- A single employer must establish the need for the particular training curriculum proposed.
- The employer must establish its ongoing commitment to training and represent that ETP funds will not displace existing resources.
- All single employer contracts are capped at \$900,000.

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 \$950,00/\$1.8M\*

\*MECs over \$950,000 need to wait 18 months from start of contract term before applying for a new contract.

### *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 \$75,000 or less, and (2) single proposals for \$75,000 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.



**RETRAINEE - JOB CREATION**

**Training Proposal for:**

**Ambulnz Health, LLC**

**Agreement Number: ET19-0263**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** J. Romero

**PROJECT PROFILE**

Contract Attributes:	SET Priority Rate Retrainee Job Creation Initiative Medical Skills Training Veterans	Industry Sector(s):	Services (G) Healthcare (62)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles, Orange, San Diego	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 380	U.S.: 380	Worldwide: 400
Turnover Rate:	5%		
Managers/Supervisors: (% of total trainees)	0%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$199,680		\$0	\$0		\$199,680

In-Kind Contribution:	100% of Total ETP Funding Required	\$230,400
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET Priority Rate Medical Skills Training	MS Didactic; MS Clinical with Preceptor; Continuous Impr; Computer Skills	64	8-200	0	\$1,170	\$22.77
				Weighted Avg: 45			
2	Retrainee Job Creation SET Priority Rate Medical Skills Training	MS Didactic; MS Clinical with Preceptor; Continuous Impr; Computer Skills	55	8-200	0	\$1,664	*\$14.62
				Weighted Avg: 64			
3	Retrainee Job Creation SET Priority Rate Medical Skills Training Veterans	MS Didactic; MS Clinical with Preceptor; Continuous Impr; Computer Skills	20	8-200	0	\$1,664	*\$14.62
				Weighted Avg: 64			

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

**Minimum Wage by County:** Job Number 1(SET/Priority Industry): SET Priority Industry Statewide Wage \$22.77. Job Number 2 (SET/Priority Industry Job Creation): \$14.62 (Los Angeles County); \$14.58 (Orange County); \$14.19 (San Diego County). Job Number 3: (SET/Priority Industry Job Creation - Veterans): \$14.62 (Los Angeles County); \$14.58 (Orange County); \$14.19 (San Diego County).

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

**Used to meet the Post-Retention Wage?:**  Yes  No  Maybe  
Up to \$2.50 per hour may be used to meet the Post-Retention Wage in Job Numbers 1, 2 and 3.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job 1:</b>		
Paramedic		15
Registered Nurse		10
Respiratory Therapist		9
EMT (Emergency Medical Technician)		30
		<b>64</b>

<b>Job 2 (Job Creation)</b>		
Paramedic		3
Registered Nurse		6
Respiratory Therapist		1
EMT		32
Dispatch		3
Biller		10
		<b>55</b>
<b>Job 3: (Job Creation – Veterans)</b>		
Paramedic		2
Registered Nurse		2
Respiratory Therapist		1
EMT		8
Dispatch		2
Biller		5
		<b>20</b>
<b>TOTAL:</b>		<b>139</b>

## **INTRODUCTION**

Founded in 2015, Ambulnz Health, LLC ([www.ambulnz.com](http://www.ambulnz.com)) (Ambulnz) provides non-emergency, inter-facility ambulance service within the Los Angeles and San Diego areas. The Company provides 24/7 ambulance transport service to healthcare providers, health plans, skilled-nursing facilities (SNF), hospitals and other medical groups. Ambulnz specializes in transporting critically ill patients needing various level of care and service such as Basic Life Support Transport (BLS), Critical Care/Advance Care Life Support Transport (ACLS), Neonatal Transports (NICU) and Bariatric Transport. Each level of transport requires a team of two highly trained Emergency Medical Technicians (EMT) and a paramedic. Nurses and respiratory therapist are added to the team depending on the level of care needed by the patient.

Ambulnz is headquartered in New York and currently operates in five locations in California (Carson, El Monte, Spring Valley, Monrovia and North Hollywood). Another location in Anaheim is expected to be operational by the end of 2018.

### **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. Ambulnz will be hiring and training 20 Veterans in the proposal (Job Number 3).

## **PROJECT DETAILS**

This is Ambulnz' first ETP Agreement. Ambulnz has steadily expanded in the Southern California market due to increasing demand. This growth requires the Company to hire additional employees, improve processes and upgrade equipment and systems software.

Ambulnz' growth in the past three years has been driven by an increase in market demand, which has led to the opening of a new facility in Anaheim, with plans to hire 185 employees in California in the next three years. The demand for non-emergency transport has increased to serve a broader population that has developed more complex medical conditions such as dialysis patients, low or high acuity patients, bariatric and neonatal patients. To respond to this demand, the Company has retained a highly skilled workforce, providing on-time and prompt response times. The increased demand will require new equipment. Ambulnz recently invested in additional 50 transport vehicles equipped with state-of-the-art technology including advanced radio communications and advanced life support equipment. It also invested in a proprietary dispatch software system (Ambulnz Software) designed to improve on-time pick-up and delivery of patients. Training will prepare and equip employees with skills to effectively and efficiently respond to needs and challenges and complete transport tasks with quality care and service.

### **Retrainee - Job Creation**

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

The Company will expand business capacity by opening a new location in Anaheim. The Company will hire 75 new employees (Job Numbers 2 and 3). Since inception, Ambulnz has grown from a relatively small business with less than 100 employees in 2015 to 380 fulltime employees as of June 2018, and the Company anticipates continued growth. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

### **Training Plan**

Training will be delivered via class/lab in Medical Skills, Computer Skills and Continuous Improvement to enhance employee skills in providing prompt responses to patients and demonstrating proficiency and quality in patient care. Training will be provided in all 6 Ambulnz locations in California.

**MS-Didactic:** Training will be offered to Paramedics, EMTs, RNs and Respiratory Therapists. Training will provide employees with in-depth knowledge and proficiency of medical care to patients including Basic Life Support, Advanced Life Support (ACLS), Neonatal Intensive Care Unit Transport, Orthopedic Stabilization, Ventilator Operation and Emergency Medical Technician Training 1.

**MS Clinical with Preceptor:** Training will be offered to Paramedics, EMTs, RNs and Respiratory Therapists. Employees will gain experience, confidence, and competency in a supportive environment. Each trainee will work closely with an assigned trainer who will be available to answer questions and collaborate and assist trainees in providing hands-on assistance to patients.

**Computer Skills:** Training will be offered to all occupations to utilize new systems (Ambulnz proprietary software, Electronic Medical Records Application, and ICD-10). Trainees will gain efficiency in using and navigating these systems.

**Continuous Improvement:** Training will be offered to all occupations. Training will help employees collaborate and communicate with other healthcare professionals in managing quality, cost-effective care for patients with complex health care needs.

## **Commitment to Training**

Ambulnz' spends approximately \$70,000 annually per facility on training. ETP funds will not displace the Company's existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

### ➤ Training Infrastructure

Ambulnz has a detailed training plan in place and is ready to start upon approval. The Director of Operations & Communications, who has prior ETP experience with another company, and the Health and Training Director will oversee the project. Training coordinators at each of the 6 locations will administer the training at their respective locations. The Company has also retained the services of a third-party subcontractor (National Training Systems, Inc.) to assist with administration.

## **RECOMMENDATION**

Staff recommends approval of this proposal.

## **DEVELOPMENT SERVICES**

Ambulnz retained National Training Systems, Inc. (NTSI) in Ladera Ranch to assist with development of this proposal for a flat fee of \$6,000.00.

## **ADMINISTRATIVE SERVICES**

Ambulnz retained NTSI in Ladera Ranch to 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:

**MEDICAL SKILLS TRAINING – DIDACTIC**

- Basic Life Support (BLS)
- Advanced Life Support
- Airborne Pathogens
- Bloodborne Pathogens
- Body Mechanics
- Cardiac Assessment
- Care of Cardiac Patients
- Care of the Bariatric Patient
- Care of Geriatric Patients
- Care of the Renal Patient
- Care of and Treatment of Shock Patients
- Care of the Stroke Patient
- Chronic Obstructive Pulmonary Disease (COPD)
- Code Blue Response and Procedures
- Critical Care
- Decontamination Procedures
- Dysrhythmia Recognition & Interpretation
- EKG & Cardiac Monitors
- Emergency Medical Technician (EMT) Training (including EMT-1)
- Equipment Operation
- Hazardous Materials/Protection
- 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
- Orthopedic Stabilization & Traction
- Oxygen Administration
- Pain Management
- Patient Assessment& Pre-Hospital 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

**MEDICAL SKILLS TRAINING – CLINICAL WITH PRECEPTOR 30%**

- **Ambulatory Patient Care**
  - Advanced Cardiac Life Support
  - Code Blue Response and Procedures
  - Cardiac Patient Care
  - Equipment Operation
  - Trauma Patient Care
  - Geriatric Patient Care
  - Pediatric Patient Care
  - Pre-Hospital Trauma Life Support
  - Respiratory Arrest
  - Patient Assessment & Pre-Hospital Care
  - Patient Transport Techniques

**CONTINUOUS IMPROVEMENT**

- Ambulance Operation
- Billing
- Call Center & Dispatch Protocols
- Communication Skills
- Conflict Resolution
- Crisis Prevention & Intervention (CPI)
- Critical Thinking
- Customer Service
- Documentation
- EMS Communication & Protocolsd-10
- Emergency Vehicle Operations Course
- HazMat for Patient Care Providers
- HIPPA/Patient Privacy
- Leadership Skills
- Performance & Quality Improvement
- Preceptor Skills (Train-the-Trainer)
- Standard Operating Procedures

**COMPUTER SKILLS**

- Microsoft Office/Excel (Intermediate and Advanced)
- Electronic Medical Records Application
- Patient Care Record
- Ambulnz App
- ICD-10 (International Statistical Classification of Diseases)

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

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



**Training Proposal for:  
AMN Healthcare, Inc.**

**Agreement Number: ET19-0224**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** San Diego

**Analyst:** M. Ibarra

**PROJECT PROFILE**

Contract Attributes:	Retrainee	Industry Sector(s):	Services  Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Counties Served:	San Diego	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 880	U.S.: 3,000	Worldwide: 3,000
<u>Turnover Rate:</u>	4%		
<u>Managers/Supervisors:</u> (% of total trainees)	2%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$93,610		\$0	\$0		\$93,610

In-Kind Contribution:	100% of Total ETP Funding Required	\$95,000
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee	Computer Skills, Cont. Improv., PL - Computer Skills, PL - Cont. Improv.	110	8 - 200	0 - 100	\$851	*\$17.03
				Weighted Avg: 37			

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

**Minimum Wage by County:** \$17.03 per hour for San Diego County

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

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

Up to \$2.03 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Account Management		10
Accounting/Finance		5
Audit/Tax		2
Client Solutions		15
MSP Implementation		8
Clinical Management		2
Clinical Reviewer		2
Credentialing Operations		26
Human Resources Operations		7
Information Technology		4
Legal Support Staff		2
Marketing/Sales		25
Supervisor/Manager		2

**INTRODUCTION**

Founded in 1985 and headquartered in San Diego, AMN Healthcare, Inc. (AMN Healthcare) ([www.amnhealthcare.com](http://www.amnhealthcare.com)) is a healthcare workforce solutions provider. The Company provides recruitment and workforce solutions such as Managed Services Program (MSP), Recruitment Process Outsourcing (RPO), and Consulting Services to healthcare organizations. AMN Healthcare also offers a broad spectrum of physician and clinical staffing services to customers



such as Kaiser Permanente, Providence Health, St. Joseph's Health, Sharp, and UC Health System.

AMN Healthcare maintains offices nationwide, including three facilities in California. The proposed training plan will target workers at the Company's headquarters in San Diego.

## **PROJECT DETAILS**

The rising demand for nurses, physicians, allied health professionals, technologists and coders, leaders, and support personnel is the biggest challenge to meeting patient care demand.

As a one-stop shop workforce provider, AMN Healthcare must meet increasing customer demand of healthcare providers. The Company must become a high performing workplace. AMH Healthcare created a new department, Business Process Improvements (BPI), to spearhead Continuous Improvement initiatives to assist with meeting clients' needs. The Department's goal is to identify and improve operations or employee skills to allow a more efficient workflow and support overall business growth.

AMN Healthcare has also implemented a Lean Six Sigma (LSS) Program to train team members to lead continuous improvement projects. To date, the program has resulted in a 2% Lean conversion increase which helped the Company's employees with career development.

ETP funding will supplement AMN Healthcare's training efforts for workers at their San Diego location. Training will focus on the Company's comprehensive Lean and Six Sigma program which will result in employees achieving Green, Yellow, and White Belt certifications in order to surpass industry standards, increase professional growth, and support overall customer demands.

### **Training Plan**

Training will be delivered via Class/Lab, Productive Laboratory (PL), and self-paced Computer-Based Training (CBT) in the following skills:

**Computer Skills** – Training topics include Intermediate Microsoft Excel and PowerPoint Application Skills.

**Continuous Improvement** – Training topics include Green, Yellow, and White Belt Lean & Six Sigma, Leadership Development, Sales Skills, and Credentialing Skills.

### **Productive Laboratory**

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

AMN Healthcare requests PL training in Computer and Continuous Improvement Skills topics such as SPC Excel as well as Lean & Six Sigma. Training will be delivered to all trainees at a 1:2 Trainer-to-Trainee ratio during the beginning stage of the LSS program. This ratio is cost-effective and has proven more efficient. PL training will allow trainees to define problems; collect and measure data supporting the problem; analyze data; apply countermeasures to address root causes; and apply control methods to prevent problem from recurring.

Trainees will receive a combination of classroom and approximately 40 hours of PL training. Training will allow the Company to continue to promote continuous improvement initiatives and complete the Company's internal LSS program. In-house trainers and training vendors will be

qualified and/or Lean Six Sigma Black Belt certified to instruct and deliver the course content and material. Trainers are responsible for directing the instructions as well as providing immediate feedback to the trainee as work is performed.

### **Commitment to Training**

ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law. The Company's Training and Development Department spends approximately \$1.1M on training in California. AMN Healthcare currently provides new hire, leadership competencies, core competencies, executive competencies, technical skills, career development, and LSS certification training to its employees at its own cost.

#### ➤ Training Infrastructure

AMN Healthcare's LSS Program Manager, a certified Project Manager, has overall responsibility of the project including scheduling, enrolling trainees, and tracking their training hours in the ETP online systems. The Company's Senior Business Process Analyst has also been designated to assist with the coordination and administration of training.

Training will be delivered by in-house instructors including the LSS Program Manager and an LSS training vendor. AMN Healthcare provides ongoing LSS training; however, implementation of ETP training and documentation of ETP-eligible training will start upon contract approval.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **DEVELOPMENT SERVICES**

N/A

### **ADMINISTRATIVE SERVICES**

N/A

### **TRAINING VENDORS**

ProgressivEdge of Temecula has been retained to provide Lean Six Sigma training for a fee of \$30,000. Other trainers will be identified for ETP recordkeeping purposes, as they are retained by AMN Healthcare.

**Exhibit B: Menu Curriculum**

**Class/Lab Hours**

8 - 200

Trainees may receive any of the following:

**COMPUTER SKILLS**

- ✚ Intermediate Microsoft Excel
- ✚ Intermediate Microsoft PowerPoint

**CONTINUOUS IMPROVEMENT**

- ✚ Green Belt: Lean & Six Sigma DMAIC
- ✚ Yellow Belt: Lean & Six Sigma DMAIC
- ✚ White Belt: Lean & Six Sigma DMAIC + Strategic Planning:  
Candidate & Project Selection
- ✚ Leadership Development
- ✚ Sales Skills
- ✚ Credentialing Skills

**Productive Lab Hours**

0 - 40

**COMPUTER SKILLS** (1:2 training ratio)

- ✚ SPC Excel

**CONTINUOUS IMPROVEMENT** (1:2 training ratio)

- ✚ Lean & Six Sigma: Business Charter; Team Building; and Change Management

**CBT Hours**

0 - 100

**CONTINUOUS IMPROVEMENT**

- ✚ Class 1: Yellow Belt (4 hours)

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



**Panel Amendment #1 Proposal for:  
Burrtec Waste Industries, Inc.  
Agreement Number: ET17-0371**

**Amendment Effective Date:** July 12, 2018

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** M. Paccerelli

**CURRENT PROJECT PROFILE**

Contract Type:	SET/HUA - Retrainee Job Creation	Industry Sector(s):	Services
Counties Served:	San Bernardino, Riverside, Imperial, Los Angeles	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Priority Industry:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Current Contract Term:	December 30, 2016 to December 29, 2018	Substantial Contribution:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

**CURRENT FUNDING**

Current Funding
\$100,000

**AMENDMENT FUNDING**

Requested Funding	Total Funding
+\$25,000	\$125,000

**AMENDMENT TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET	Business Skills; Comm'l Skills; Computer Skills; Cont. Impr.; OSHA 10/30; HazMat; HAZWOPER; Literacy Skills	210	8-200	0	\$375	\$28.37
				Weighted Avg: 25			
2	Retrainee SET HUA	Business Skills; Comm'l Skills; Computer Skills; Cont. Impr.; OSHA 10/30; HazMat; HAZWOPER; Literacy Skills	70	8-200	0	\$375	\$15.60
				Weighted Avg: 25			
3	Retrainee SET Job Creation	Business Skills; Comm'l Skills; Computer Skills; Cont. Impr.; OSHA 10/30; HazMat; HAZWOPER; Literacy Skills	40	8-200	0	\$500	*\$12.77
				Weighted Avg: 25			

\*It will be made a condition of contract that the 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.

<p><b>Minimum Wage by County:</b>                  Job Number 1: \$28.37 per hour Statewide                  Job Number 2: \$15.60 per hour for San Bernardino, Riverside, and Imperial Counties                  Job Number 3: \$12.77 per hour for San Bernardino, Riverside, and Imperial Counties; and \$13.73 for Los Angeles County  <b>Health Benefits:</b> <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No This is employer share of cost for healthcare premiums – medical, dental, vision.  <b>Used to meet the Post-Retention Wage?:</b> <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No                  Up to \$6.37 per hour may be used to meet the Post-Retention Wage in Job Number 1.                  Up to \$3.60 per hour may be used to meet the Post-Retention Wage in Job Number 2.                  Up to \$3.73 per hour may be used to meet the Post-Retention Wage in Job Number 3.</p>
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Wage Range by Occupation	
Occupation Title	Wage Range
<b>Job Number 1</b>	
Customer Service Representative	
Administrative Staff	
Shop Maintenance Staff	

Equipment Operators	
Equipment Maintenance Staff	
Drivers	
<b>Job Number 2</b>	
Customer Service Representative	
Administrative Staff	
Shop Maintenance Staff	
Equipment Operators	
Equipment Maintenance Staff	
Drivers	
<b>Job Number 3</b>	
Customer Service Representative	
Administrative Staff	
Equipment Operators	
Equipment Maintenance Staff	

## **INTRODUCTION**

Founded in 1955, Burrtec Waste Group (BWG) ([www.burrtec.com](http://www.burrtec.com)) is a private-sector solid waste company providing services to residential, commercial and industrial customers in California. Its operations are classified into three major categories that are interdependent and complementary to one another – Waste Collection, Processing, and Disposal. These lines of business create a synergy that enables Burrtec to offer state-of-the-art services. Its client base includes local government.

## **AMENDMENT DETAILS**

BWG is requesting funding for additional 5 hours per trainee from 20 to 25 hours as the Company has exhausted its training fund and trainees require more training. The additional funding will allow employees to continue training in commercial skills required to improve cost and product quality including good operations practices, equipment operations, paint application techniques, and waste treatment.

In summary:

- The funding amount will increase by \$25,000 (from \$100,000 to \$125,000);
- The weighted average hours in Job Numbers 1-3 will increase from 20 to 25.
- The average cost per trainee will increase from \$300 to \$375 in Job Numbers 1 and 2 and from \$400 to \$500 in Job Number 3.
- The In-Kind Contribution will increase by \$37,172 (from \$141,570 to \$178,742).

## **RECOMMENDATION**

Staff recommends approval of this Amendment.

**CURRENT CONTRACT PERFORMANCE**

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

Agreement No.	Approved Amount	Term	No. Trainees Enrolled	No. Completed Training	No. Retained
ET17-0371	\$100,000	12/30/2016- 12/29/2018	91	0	0

To date, 7,383 eligible training hours have been tracked (100% of the current Agreement amount).

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

8-200

Trainees may receive any of the following:

**COMMERCIAL SKILLS**

- Equipment Operation
- ASE
- Smith System
- Vehicle Operation (Side Loader, Front Loader, Bin Delivery & Roll Off)
- Forklift Training

**BUSINESS SKILLS**

- Customer Service
- Accounting/Payroll
- Negotiation Skills
- Conflict Resolution

**CONTINUOUS IMPROVEMENT**

- Process Improvement
- Root Cause Analysis
- Problem Solving

**COMPUTER SKILLS**

- Microsoft Word, Excel, PowerPoint (Advanced & Intermediate)
- Waste Tec Software

**OSHA 10/30 (Certified OSHA Instructor)**

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

**HAZWOPER**

- HAZWOPER Instructor-Certified Training (requires completion of certified course) 40 hour and the 8-hour Refresher

**HAZARDOUS MATERIALS**

- Hazardous Materials Handling
- Hazardous Waste Identification
- Globally Harmonized System
- Hazardous Communication
- Storm Water Pollution Prevention Plan (SWPPP)
- Certified Unified Program Agency (CUPA)
- E-Waste Training
- Spill Prevention
- IIPP
- Acetylene Fuel and Gas Safety
- Battery Handling Changing and Charging
- Bloodborne Pathogen Awareness
- Vehicle Fuels & Fuel Safety

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



**LITERACY SKILLS**

- Vocational English as a Second Language (VESL)

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

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



**RETRAINEE - JOB CREATION**  
**Training Proposal for:**  
**Erickson-Hall Construction Co.**  
**Agreement Number: ET19-0254**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** San Diego

**Analyst:** H. Bernard

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative HUA SET	Industry Sector(s):	Construction (C) Construction (23)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Diego, Orange, Riverside, Imperial	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 150	U.S.:150	Worldwide: 150
<u>Turnover Rate:</u>	3%		
<u>Managers/Supervisors:</u> (% of total trainees)	0%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$187,200		\$0	\$0		\$187,200

In-Kind Contribution:	100% of Total ETP Funding Required	\$276,566
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate SET	Business Skills Commercial Skills Computer Skills Cont. Imprv. HazMat OSHA 10/30	130	8 - 200	0	\$1,040	\$22.77
				Weighted Avg: 40			
2	Retrainee Priority Rate Job Creation Initiative SET	Business Skills Commercial Skills Computer Skills Cont. Imprv. HazMat OSHA 10/30	40	8 - 200	0	\$1,300	*\$13.66
				Weighted Avg: 50			

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

**Minimum Wage by County:** Job Number 1: SET Modified Statewide Average Wage - \$22.77 per hour; Job Number 2: Riverside & Imperial Counties \$13.66 per hour, San Diego County \$14.19 per hour and Orange County \$14.58 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 \$2.50 per hour in Job Number 1 and up to \$0.58 per hour in Job Number 2 may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Administrative Staff		43
Project Lead		46
Superintendent		33
Estimating Staff		8
<b>Job Number 2</b>		
Administrative Staff		16
Project Lead		10
Superintendent		12
Estimating Staff		2

## **INTRODUCTION**

Erickson-Hall Construction Co. ([www.ericksonhall.com](http://www.ericksonhall.com)) (EHCC) was founded in 1998 and is headquartered in San Diego. The Company offers general construction services in preconstruction, general contracting, construction management, design-build, design assist-build, lease-leaseback, and program management. The Company's primary customers are public works projects including education, fire, religious buildings, essential services, and civic projects. EHCC has four locations, all of which will participate in training (Escondido, Orange, Riverside and Imperial). This will be the Company's first ETP project.

## **PROJECT DETAILS**

EHCC experienced 30% revenue growth last year due to expanding customer base and expects this trend to continue through the next two years. The Company is currently working with Long Beach Unified School District on upgrades to five schools and anticipates the School District adding an additional 10 schools in the next four years. In addition, the Company was recently awarded a \$37 Million contract to build a new elementary school in the Palm Springs Unified School District. Other upcoming projects include the Anaheim Free Methodist Church, Rancho Santa Fe Fire Station 5, and a new El Centro Aquatic Center, totaling over \$63 Million. These new projects require training to ensure staff can meet customer's needs.

EHCC must also provide extensive training to keep up with constant changes in the construction industry. Changes include new energy efficiency, sustainable design, and emerging technologies; equipment/software; building standards; and state regulatory updates including Proposition 51 (a bond that provides \$9 Billion for repairs and upgrades to K-12 schools and higher education facilities) and Title 24 (California's legislative mandate to reduce the state's energy consumption).

### **Retrainee - Job Creation**

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

The Company is expanding existing business capacity by adding newly-hired employees to an existing function due to growth of customer base and expanding geographic area. This year the Company has hired 36 net new full-time staff, with 19 hired in Q2 of 2018. EHCC expects this trend to continue into 2019 and as such, will hire 40 new employees (Job Number 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

### **Training Plan**

Training will be provided in a Classroom/Laboratory, E-Learning, and Videoconference setting. Due to EHCC's multiple locations, E-Learning and Videoconference will allow the Company to train staff simultaneously at different locations. The following are some of the curriculum topics included in the Menu Curriculum:

**Business Skills:** Accounting Skills, Communication Skills, Design Build Budgeting, Leadership Skills, Product Knowledge, Project Management

**Commercial Skills:** Documentation Skills, Estimating Skills, Equipment Operations, Materials Ordering, Green Construction, Underground Utility

**Computer Skills:** Accounting/Project Management Software, BlueBeam, Customer Relationship Management (CRM), Scheduling Software, Virtual Design & Construction

**Continuous Improvement:** Lean Techniques, Process Improvement, Project Planning, Quality Control, Sustainability, Zero Waste

**Hazardous Materials:** These training topics are not Certified Safety Training per ETP guidelines but will include Handling Hazardous Materials and Globally Harmonized Systems, which are required for frontline staff.

### **Certified Safety Training**

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

### **Commitment to Training**

Currently, EHCC spends approximately \$100,000 annually on new hire training, best practices, communication skills and on-the-job training. ETP funds will not displace the Company’s existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

#### ➤ Training Infrastructure

This project will be overseen by the Director of Human Resources and assisted by a Human Resources Coordinator and Professional Development Committee at the headquarter location in San Diego. In addition, one staff member at each of the Company’s locations will be dedicated to administration of the ETP project. Training Funding Source has also been retained to assist with administration under the project.

Both internal trainers and vendors will be utilized for training under this Agreement. The Company currently has a formal training program to keep up with industry changes and company growth. The training is overseen by an internal Professional Development Committee which meets regularly to assess training needs and training curriculum.

### **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. EHCC is a priority industry and as such, will be required to meet the Modified Statewide Average Wage.

### **High Unemployment Area**

Eight trainees in Job Number 1 and two trainees in Job Number 2 work in Imperial County, a High Unemployment Area (HUA) with unemployment exceeding the state average by at least 25%. The Company’s locations in Imperial County qualify for HUA status under these standards. However, EHCC is not asking for a wage modification.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

## **DEVELOPMENT SERVICES**

EHCC retained Training Funding Source in Seal Beach to assist with development of this proposal for a flat fee of \$3,900.

## **ADMINISTRATIVE SERVICES**

EHCC retained Training Funding Source in Seal Beach to 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 & E-Learning/Videoconferencing Hours**

8 – 200                      Trainees may receive any of the following:

**BUSINESS SKILLS**

- Accounting
- Client Relations
- Communication/Conflict Resolution
- Design Build Budgeting
- Estimating
- Job Costing
- Leadership
- Marketing & Business Development, Sales
- Negotiation
- Presentation Skills
- Product Knowledge
- Project Management

**COMMERCIAL SKILLS**

- Change Order
- Documentation, Daily Logs, RFI (Request for Information)
- Energy Efficiency
- Estimating
- Equipment Operations
- Field Operational Procedures
- Green Construction
- Installation Techniques
- Materials Ordering, Handling and Storage
- Scaffold, Signs, Signals and Barricades
- Site Procedures/Logistics
- Storm Water Pollution Prevention Program
- Supplier Diversity
- Trenching/Excavation
- Underground Utility
- Walk Through Procedures
- Workzone Traffic Control
- Workflow/Work Practices

**COMPUTER SKILLS**

- Accounting/Project Management -Foundation
- Asset tracker
- Blue Beam
- Customer Relationship Management (CRM)
- Dashboard
- EBM- Estimating
- Field Building Industry Management (BIM)
- Financial Accounting Software
- InDesign

- Job Management System (JMS)
- Microsoft Office, Project
- MS PROJECT
- Smartsheet
- Scheduling Software
- Timekeeping system/Mobile app Virtual & Augmented Reality
- Virtual Design & Construction

**CONTINUOUS IMPROVEMENT**

- Goal Setting
- Lean Techniques
- Mentoring
- Performance/Process/Productivity Improvement
- Project Planning/Delivery
- Quality Control
- Sustainability
- Teamwork
- Zero Waste

**HAZARDOUS MATERIALS**

- Handling Hazardous Materials
- Globally Harmonized System

**OSHA 10/30** (OSHA Certified Instructor)

- OSHA 10
- OSHA 30

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

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





**RETRAINEE - JOB CREATION**  
**Training Proposal for:**  
**Golden Star Technology Inc.**  
**Agreement Number: ET19-0267**

Panel Meeting of: September 28, 2018

ETP Regional Office: North Hollywood

Analyst: L. Vuong

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative	Industry Sector(s):	Services Technology/IT  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: 116	U.S.:120	Worldwide: 126
Turnover Rate:	5%		
Managers/Supervisors: (% of total trainees)	8%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$179,400		\$0	\$0		\$179,400

In-Kind Contribution:	100% of Total ETP Funding Required	\$302,727
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Impr.	98	8-200	0	\$1,560	\$17.54
				Weighted Avg: 60			
2	Retrainee Priority Rate Job Creation Initiative	Business Skills, Commercial Skills, Computer Skills, Continuous Impr.	17	8-200	0	\$1,560	*\$14.62
				Weighted Avg: 60			

\*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:** \$17.54 per hour for Job Number 1; and \$14.62 per hour for Job Number 2 (Job Creations) for Los Angeles County.

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

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

Up to \$1.68 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Service Technician		35
Engineer		8
Administrative Staff		2
Sales Staff		37
Operational Staff		8
Manager/Supervisor		8
<b>Job Number 2</b>		
Service Technician		6
Engineer		2
Administrative Staff		1
Sales Staff		5
Operational Staff		2
Manager/Supervisor		1

## **INTRODUCTION**

Founded in 1985, Golden Star Technology Inc. (GST) ([www.gstes.com](http://www.gstes.com)) has over 30 years of experience providing Information Technology (IT) and Audio Visual (AV) integrated services and solutions for commercial enterprises, governmental agencies and educational institutions. The Company offers a wide variety of services such as designing, engineering, configuration, installation, integration, networking and wireless implementation, supply chain and logistics management, data storage and infrastructure, online E-Commerce tool, and help desk support. Headquartered in Cerritos, GST has two servicing facilities in California: Cerritos and Corona. The Company also has offices located in Nevada, Minnesota, Florida, Hong Kong, China, Taiwan and Japan. This training proposal will only target workers at Cerritos facility. Major customers include community colleges and school districts, County and City of Los Angeles, DreamWorks Animation, Wynn Hotels, Raytheon Corporation and the US Navy.

## **PROJECT DETAILS**

This will be GST's third ETP Agreement, the second in the last five years. GST had tremendous success in its prior ETP Agreement and is ready to continue training to further strengthen staff and business. In the past year, GST has experienced a 35% growth in business and increased its workforce from 109 employees to 116 employees at the Cerrito facility. The Company anticipates additional workforce growth of 15% in the coming year. As the Company grows and technology advances, employees will need new and upgraded skills training. Workers will receive in-depth training in internal systems, products and services, customer specifications and new technologies including security, data, Cloud application, infrastructure and mobility environment.

Additionally, to keep up with technology advances and business growth, GST recently invested approximately \$700,000 in NetSuite software and new equipment (such as a bucket seat for commercial vehicles) and implemented a new Enterprise Resources Planning system. The Company is also striving to become International Organization for Standardization (ISO) 9001:2015 certified. Certification will help to expand business, improve quality products, become more efficient, and remain competitive.

### **Retrainee - Job Creation**

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

GST will expand business capacity by purchasing new equipment and hiring 17 new employees at its Cerritos facility (Job Number 2). Training will allow new employees to learn and operate sophisticated equipment, technology systems, and computer programs for a better understanding of the Company's business operations. Trainees must be hired within the three-month period prior to Panel approval or during the term of contract. These trainees will be hired into "net new jobs" as a condition of contract.

### **Training Plan**

Training will take place at the Cerritos facility. Classroom/Laboratory and Videoconference training will be provided by in-house subject matter experts and vendors if needed.

**Business Skills:** Training will be offered to all occupations. Trainees will gain the knowledge and skills to improve customer service and job performance through client relations, communication, and teambuilding.

**Commercial Skills:** Training will be offered to all occupations and will focus on the Company's products and services to better serve customers. Trainees will learn and improve coding, programming, installation and implementation.

**Computer Skills:** Training will be offered to all occupations in various software applications to support business operations. Training will allow trainees to effectively use the Company's complex automated systems and implement necessary software including NetSuite to provide efficient and effective customer service.

**Continuous Improvement:** Training will be offered to all occupations to improve quality and service. Training will increase performance in quality and process improvements to reduce costs and waste and streamline delivery processes.

### **Commitment to Training**

GST has a current annual training budget of approximately \$150,000 for its Cerritos facility. Training consists of basic computer skills, sexual harassment prevention, basic safety and new employee orientation training.

ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law. ETP funds will help GST implement new curriculum related to new products and technologies and expand training to its growing workforce.

#### ➤ Training Infrastructure

Training is scheduled to begin upon Panel approval. GST has designated Human Resources staff to oversee ETP training and all administrative responsibilities. GST has also retained a subcontractor to assist with administration.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET17-0215	Cerritos	08/18/16 – 08/17/18	\$93,440	\$93,440 (100%)

### **DEVELOPMENT SERVICES**

GST retained Training Funding Source (TFS) in Seal Beach to assist with development of this proposal for a flat fee of \$7,900.

### **ADMINISTRATIVE SERVICES**

GST also retained TFS to 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**

- Client Relations
- Coaching and Performance Improvement
- Equipment Operations
- Leadership & Management
- Manufacturer/Original Equipment Manufacturer (OEM)
- Marketing
- Professional and Interpersonal Communication
- Project Management
- Proposal and Business Development
- Sales
- Team Building

**COMMERCIAL**

- Audio Visual Integration and Solutions (Consultation, System Design, Programming & Coding, Installation & Implementation, Service Repairs)
- Managed Services (Print, Technical, Consulting, Infrastructure Services, Deployment/Logistics, B2B/e-Commerce)

**COMPUTER SKILLS**

- Adobe (PDF, InDesign, Photoshop, Illustrator, etc.)
- Applications Development & Knowledge
- AutoCAD & Line Drawings
- Audio Visual Programming
- Backup & Disaster Recovery
- Big Data and Analytics
- Cloud Applications
- Enterprise Resources Planning (ERP)
- Information Technology Programming
- Microsoft Office (Intermediate & Advance)
- Networking and Wireless
- Project Management System
- Security and Services
- Surveillance & Access Control
- System Design
- Web Design and Graphics Software
- Wiring & Cabling

**CONTINUOUS IMPROVEMENT**

- International Organization for Standardization (ISO 9001:2015)
- Process Improvement
- Quality Management Systems
- Standard Operating Procedures

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



## RETRAINEE - JOB CREATION

Training Proposal for:

**In Steps, Inc.**

**Agreement Number: ET19-0248**

Panel Meeting of: September 28, 2018

ETP Regional Office: San Diego

Analyst: M. Ibarra

### PROJECT PROFILE

Contract Attributes:	SET Retrainee Priority Rate Medical Skills Training Job Creation	Industry Sector(s):	Services (G) Healthcare (62)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Orange, San Diego, and Los Angeles	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 125	U.S.: 125	Worldwide: 125
<u>Turnover Rate:</u>	9%		
<u>Managers/Supervisors:</u> (% of total trainees)	0%		

### FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$185,250		\$0	\$0		\$185,250

In-Kind Contribution:	100% of Total ETP Funding Required	\$213,600
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET Priority Rate Medical Skills Training	Busines Skills, Computer Skills, Medical Skills - Didactic, Medical Skills - Clinical with Preceptor	113	8 - 200	0	\$1,170	\$22.77
				Weighted Avg: 45			
2	Retrainee SET Priority Rate Medical Skills Training Job Creation Initiative	Busines Skills, Computer Skills, Medical Skills - Didactic, Medical Skills - Clinical with Preceptor	30	8 - 200	0	\$1,768	\$14.19
				Weighted Avg: 68			

**Minimum Wage by County:**  
 Job Number 1: SET Priority Industry Wage \$22.77 per hour  
 Job Number 2 (Job Creation): \$14.58 per hour in Orange County; \$14.19 per hour in San Diego County; and \$14.62 per hour in Los Angeles County

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

**Used to meet the Post-Retention Wage?:**  Yes  No  Maybe  
 Up to \$1.27 per hour may be used to meet the Post-Retention Wage for Job Number 1 only.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Therapist		85
Case Manager		10
Board Certified Behavior Analyst		18
<b>Job Number 2: Job Creation</b>		
Therapist		30



## **INTRODUCTION**

Founded in 2010, In Steps, Inc. (In Steps) ([www.instepps.com](http://www.instepps.com)) provides treatment, training, and support to children with autism and other developmental disabilities. The Company provides a wide range of training and support services including individualized behavior therapy to students with Autism Spectrum Disorder (ASD), other developmental disabilities and delays, and other diagnoses such as Attention-Deficit/Hyperactivity Disorder (AD/HD) or Anxiety Disorders; social skills teaching in the natural environment; social skills in groups; school support; parent support and education; assessments and evaluations; workshops for parents; summer camps; and onsite training and coaching in Pivotal Response Treatment (PRT) for professionals.

In Steps' treatment methods are consistent with the evidence-based practices outlined by leading national experts such as The National Professional Development Center on Autism, Autism Evidence-Based Practice Review Group, and Autism Standards Project.

The proposed training plan will target workers at the Company's three California facilities located in the cities of Irvine (headquarters), Vista, and Los Angeles. In Steps is eligible for ETP funding under Special Employment Training (SET) for frontline workers. The Company also qualifies for ETP's Priority Industry reimbursement as an Outpatient Mental Health Center.

## **PROJECT DETAILS**

In Steps' business is in the midst of multiple community and industry changes. In Steps reports that there is a continued increase in children diagnosed with autism in the last 18 years. The Centers for Disease Control and Prevention (CDC) reports that, according to estimates from CDC's Autism and Developmental Disabilities Monitoring (ADDM) Network, approximately 1 in 59 children in 2016 (up from 1 in 150 in year 2000) have been identified with ASD, and expects to continue to grow as ASD arise in childhood (generally before age three) and continue throughout a person's life.

Coupled with the aforementioned, the demand for services has increased due to changes in the legislation. A newly enacted healthcare coverage legislation, SB126, requires healthcare plans to provide benefits for specified conditions, including coverage for behavioral health treatment, for pervasive developmental disorder or autism.

In addition, there is an existing shortage of trained autism specialists, a statewide short supply of healthcare professionals with expertise and experience in the field of ASD. For example, In Steps receives an average of two requests for services from families with a child with autism per day that it cannot serve due to the Company's skilled personnel shortage.

In order to support the increase in the demand for services, and address the shortage of skilled healthcare professionals in the industry, In Steps has committed to develop a strategic plan to improve its healthcare services as well as increase staffing requirements. To this end, In Steps plans to hire, train, and retain adequate supply of skilled healthcare workers. Consequently, the Company has developed a comprehensive training program focused on strengthening the capacity of its new and existing healthcare staff in order to support active engagement and skill development of clients with autism in treatment. Training will allow the Company to provide successful treatment outcomes during early intervention to prevent significant long-term care challenges for families and healthcare providers.

ETP funds will allow In Steps to provide extensive training to enhance skills, maintain program effectiveness, and improve treatment outcomes in order to successfully deliver exceptional health care services and support customer demands.

## Training Plan

In this proposal, approximately 143 existing and newly-hired healthcare workers will receive various course topics in the following:

**Business Skills** – Training topics include Leadership Skills, Team Building, Interpersonal Skills, Medical Writing, Best Practices, and HIPAA Reporting.

**Computer Skills** – Training topics include Practice Management Software Application Skills.

### Medical Skills Training (Didactic and Clinical with Preceptor)

This program provides funding for nurses and allied healthcare occupations with a Reimbursement Rate of \$26 for clinical didactic and clinical with preceptor training model.

All allied healthcare staff will receive one or more modules of MS Didactic training (classroom) in advanced treatment care to ensure competency. In Steps reports that a newly-hired Therapist will require at least 100 hours (up to 150 hours in the first year) of Medical Skills training to provide the skills necessary to effectively work with patients and parents, while existing healthcare staff trainees receive at least 70 hours of ongoing Medical Skills training to ensure client outcomes and family satisfaction.

Didactic training will be provided in conjunction with Clinical with Preceptor training to enhance the learning environment. Fundamentals are required to provide the framework to support the clinical "hands-on" training. Together, these training environments will enhance learning opportunities and allow trainees to better understand clinical processes in order to prepare them for work with individuals with autism from early intervention through adulthood to help develop the skills necessary to participate in family and community life.

All trainees are also projected to participate in MS Clinical Preceptor training. Preceptorships are designed to ensure competency in knowledge, attitude, and skills necessary to function in a specific role within the organization. The combination of Didactic and Clinical with Preceptor training will offer trainees a supportive environment in which healthcare staff of all skill levels can become clinically competent and emotionally adjusted over a condensed training period.

### Retrainee - Job Creation

In support of job creation, the Panel offers incentives to companies that commit to hiring new employees. Under the Retrainee-Job Creation program, training for newly-hired employees will be subject to a lower post-retention wage.

In Steps projects a substantial increase in the number of children diagnosed with ASD, expecting up to 40% in the next two years. The increasing number of individuals with autism will result in the increase of customer demand. To support and keep pace with the Company's growth and business goals mentioned above, In Steps plans to add a total of 30 newly-hired Therapists to its existing business functions (Job Number 2): 15 for Irvine, 7 for San Diego, and 8 for Los Angeles locations. The date-of-hire for all trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

### Impact/Outcome

ETP funding will substantially contribute to the Company's efforts to strengthen training curricula and train current and new staff to effectively care for clients with autism and also meet legislative

mandates. Funding will also assist in hiring and training novice Therapists and will be able to retain them long-term.

In Steps trainees are expected to acquire the following pivotal practical skills through its training program:

- Ability to implement evidence-based techniques to effectively address client's social interaction, communication, and behavioral challenges;
- Ability to support parents to help their children become more motivated; as well as active participants in family activities, routines, and interactions; and
- Ability to identify their own strengths, abilities, and challenges in providing treatment; address any skill gaps; and seek ongoing training and coaching to ensure optimal treatment outcomes.

### **Commitment to Training**

ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law. The Company's annual training budget per facility is \$45,000. In the past, employee training included sexual harassment prevention, new hire orientation, diversity training, conflict resolution, and general safety training.

#### ➤ Training Infrastructure

In Steps plans to contract with an administrative subcontractor to assist with ETP project administration. The Company's Director of Training will be the lead responsible for the management and administration of the ETP project. In addition, an Administrative Staff has been designated to assist with scheduling, coordination, and administration of training. The Chief Operating Officer will have the overall responsibility of the proposed ETP contract.

Training will be delivered by in-house instructors, and vendors as needed. In Steps provides ongoing training; however, implementation of ETP training and documentation of ETP-eligible training will start upon contract approval.

### **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.

#### **SET Priority Industry Modification**

For trainees employed in a priority industry, the Panel may modify the SET wage up to 25% below the statewide average hourly wage to \$22.77. This wage modification is intended to train entry-level healthcare workers in lower wage occupations (Therapist and Case Manager) to provide opportunities for promotion, wage increase, and long-term job security.

#### **Full-time Employment**

Company representatives report that In Steps' work with children and young adults who are typically available after school hours. In addition, the work environment could be demanding for staff. As such, a permanent, full-time In Steps healthcare employee is allowed to work at least 30 hours each week to allow flexibility and healthier work environment for staff.

For benefits eligibility purposes, these full-time workers are eligible to receive or earn any benefits and/or other company-provided benefits program. In Stepps confirms that all trainees funded in this proposal are full-time, permanent employees who have flexible work schedule with at least 30 hours a week.

As such, In Stepps requests to revise the ETP standard full-time employment requirement of 35 hours per week to 30 hours per week to accommodate all trainees funded in the proposed training plan.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **DEVELOPMENT SERVICES**

In Stepps retained Training Refund Group (TRG) in Anaheim to assist with development of this proposal for a flat fee of \$8,000.

### **ADMINISTRATIVE SERVICES**

TRG will also perform administrative services in connection with this proposal for an amount 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**

- Leadership Skills
- Team Building
- Interpersonal Skills
- Medical Writing
- Best Practices
- HIPAA Reporting

#### **COMPUTER SKILLS**

- Practice Management Software

#### **MEDICAL SKILLS (DIDACTIC)**

- Applied Behavior Analysis (ABA) Basics
- Autism Spectrum Disorder (ASD)/Developmental Disabilities (DD)
- Behavior Reduction Strategies (Antecedent, Reactive)
- Challenging Behaviors
- Crisis Intervention Strategies
- Crisis Plan
- Data Collection
- Developmental Assessment for Young Children (DAYC2)
- Developmental, Adaptive Assessments
- Discrete Trial Training (DTT)
- Early Start Programming
- Early Start Supervision
- Expressive Skills/Prompting
- Function Based Interventions
- Intro to Parent Consultation
- Introduction to Applied Behavior Analysis (ABA)
- Introduction to Pivotal Response Treatment (PRT) (Super Nanny)
- Maintenance, Generalization
- Motivation, Shared Control
- Naturalistic Developmental Behavior Interventions (NDBI)
- Parent Consultation Implementation
- Parent Training Curriculum
- Pivotal Response Treatment (PRT)
- Pivotal Response Treatment Fidelity of Implementation
- Providing Support and Feedback
- Receptive Skills/Prompting
- Research Units in Behavior Intervention (RUBI)
- Skill Acquisition Strategies
- Task Analyses
- Visual Supports

#### **MEDICAL SKILLS (CLINICAL WITH PRECEPTOR)**

- Applied Behavior Analysis (ABA) Basics

- Autism Spectrum Disorder (ASD)/Developmental Disabilities (DD)
- Behavior Reduction Strategies (Antecedent, Reactive)
- Challenging Behaviors
- Crisis Intervention Strategies
- Crisis Plan
- Data Collection
- Developmental Assessment for Young Children (DAYC2)
- Developmental, Adaptive Assessments
- Discrete Trial Training (DTT)
- Early Start Programming
- Early Start Supervision
- Expressive Skills/Prompting
- Function Based Interventions
- Intro to Parent Consultation
- Introduction to Applied Behavior Analysis (ABA)
- Introduction to Pivotal Response Treatment (PRT) (Super Nanny)
- Maintenance, Generalization
- Motivation, Shared Control
- Naturalistic Developmental Behavior Interventions (NDBI)
- Parent Consultation Implementation
- Parent Training Curriculum
- Pivotal Response Treatment (PRT)
- Pivotal Response Treatment Fidelity of Implementation
- Providing Support and Feedback
- Receptive Skills/Prompting
- Research Units in Behavior Intervention (RUBI)
- Skill Acquisition Strategies
- Task Analyses
- Visual Supports

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



**RETRAINEE - JOB CREATION**

**Training Proposal for:**

**Levy Premium Foodservice Limited Partnership**

**Agreement Number: ET19-0259**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** M. Reeves

**PROJECT PROFILE**

Contract Attributes:	Retrainee Job Creation Initiative	Industry Sector(s):	Services (G) Services (61, 71, 72, 81, 92)  Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Counties Served:	Los Angeles	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No UNITE HERE Local 11		
Number of Employees in:	CA: 3,000	U.S.:28,000	Worldwide: 500,000
<u>Turnover Rate:</u>	12%		
<u>Managers/Supervisors:</u> (% of total trainees)	14%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$199,676		\$0	\$0		\$199,676

In-Kind Contribution:	100% of Total ETP Funding Required	\$201,166
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee	Business Skills, Commercial Skills, Computer Skills, Continuous Imp.	239	8-200	0	\$644	\$17.54
				Weighted Avg: 28			
2	Retrainee Job Creation Initiative	Business Skills, Commercial Skills, Computer Skills, Continuous Imp.	55	8-200	0	\$832	*\$14.62
				Weighted Avg: 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.

**Minimum Wage by County:** Job Number 1: \$17.54 per hour for Los Angeles County.  
 Job Number 2 (Job Creation): \$14.62 per hour for Los Angeles County.  
**Health Benefits:**  Yes  No This is employer share of cost for healthcare premiums – medical, dental, vision.  
**Used to meet the Post-Retention Wage?:**  Yes  No  Maybe  
 Up to \$2.50 per hour (Job Number 1) and \$1.37 per hour (Job Number 2) may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Administrative Staff		6
Culinary Staff		40
Concessions Staff		100
Premium Staff		50
Warehouse Staff		8
Supervisor/Manager/Director		35
<b>Job Number 2</b>		
Administrative Staff		5
Retail Staff		45
Supervisor/Manager/Director		5

**INTRODUCTION**

Founded in 1976, Levy Premium Foodservice Limited Partnership (Levy) ([www.LevyRestaurants.com](http://www.LevyRestaurants.com)) is the food and beverage concessionaire for Staples Center in downtown Los Angeles. Levy at Staples Center is part of a nationwide company known as Levy's Restaurants. Levy's parent company, Compass Group, USA, is responsible for the entire Staples Center entertainment complex.



With Staples Center being the home to NBA, NHL and WNBA teams, as well as host to various concerts, family events, and awards shows throughout the year, Levy provides food and beverage service to a wide variety of entertainment goers. Levy is eligible for standard retraining as a company primarily engaged in providing services directly to customers located both inside and outside of California. This will be the Company's first ETP Agreement.

Levy has provided a union letter of support from UNITE HERE Local 11, which represents the Culinary, Concessions, Premium, and Warehouse Staff participating in this proposal.

## **PROJECT DETAILS**

As Levy continues to grow both inside and outside of California, the Company is focusing its efforts on training and development. Each Levy venue has a large employee base that requires very intensive training. Levy also works closely with its union partner to create consistent curriculum content that benefits the Company's union team members.

Levy functions as a restaurant, arena, and VIP services establishment, constantly serving food and alcohol, and dealing directly with the public; therefore, it is imperative to keep staff well-trained and knowledgeable regarding hospitality, food management, and safety. The proposed training plan has been designed to upgrade the skills of Levy's existing workforce, integrate new employees, and implement process improvements to enhance productivity and operational efficiency.

Training will take place at the Company's location in Los Angeles, and will be delivered by in-house subject matter experts and vendors as needed.

### **Retrainee - Job Creation**

The Panel offers incentives to companies that commit to hiring new employees. Newly-hired trainees will be subject to a lower post-retention wage.

Levy plans to expand its business through the acquisition of the TEAM LA retail business at the Staples Center location. TEAM LA products include various items representing all teams that play inside Staples Center (Lakers, Kings, Sparks, and Clippers). Levy anticipates this business addition will generate new sales growth and e-commerce opportunities from markets outside California. Therefore, the Company will hire 55 new employees (Job Number 2) to support the anticipated retail growth.

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

### **Training Plan**

Training will be delivered via Class/Lab as outlined below:

**Business Skills:** Training will be offered to all occupations. Training will focus on communication, product knowledge, interpersonal skills, and team building. Trainees will learn valuable techniques to improve effectiveness in their roles.

**Commercial Skills:** Training will be offered to all occupations. Training will teach workers the necessary guest service skills and procedures to deliver high quality customer service to restaurant/arena guests.

**Computer Skills:** Training will be offered to all occupations. Employees will receive training in the functionality and capabilities of various business software applications. Trainees will develop the navigation and resource planning skills to perform their jobs more efficiently. Training will improve office customer relations and office productivity and will include customer relationship management, Microsoft Office applications, expense management, and reservation systems.

**Continuous Improvement:** Training will be offered to all occupations. Training will focus on change management and process improvements that enhance productivity through strong leadership, problem solving, and teamwork.

### **Commitment to Training**

Levy spends an estimated \$20,000 annually on training. The Company currently provides new hire onboarding and basic job skills training centered on the guest experience. Levy also has training programs that focus on leadership development. Safety training is provided in accordance with all pertinent requirements under state and federal law.

#### ➤ Training Infrastructure

Levy's Director of Human Resources will oversee project administration and training. The Company's Human Resources Manager and additional Operations Staff will assist with training coordination, tracking and documentation. Levy has also retained an outside administrative consultant to ensure that all training adheres to ETP requirements.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **DEVELOPMENT SERVICES**

Training Funding Source in Seal Beach assisted with development of this proposal for a flat fee of \$8,900.

### **ADMINISTRATIVE SERVICES**

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

### **TRAINING VENDORS**

To Be Determined

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

8 - 200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- ✚ Accounting- Understanding P&L's
- ✚ LevySource Website
- ✚ Budgeting/Financial Management/Forecasting
- ✚ Business Development
- ✚ Cash Handling Procedures
- ✚ Coaching
- ✚ Communication Skills
- ✚ Creating a Respectful Workplace
- ✚ Email Etiquette
- ✚ Goal Setting
- ✚ Guest Service Skills
- ✚ Leadership
- ✚ Menu Presentation
- ✚ Performance Management
- ✚ Planning/Organizing
- ✚ Product Knowledge
- ✚ Sales/Cold Calling
- ✚ Social Media Etiquette and Legal Ramification
- ✚ Special Event Contracts
- ✚ Team Building
- ✚ Time Management/Priority Setting

**COMMERCIAL SKILLS**

- ✚ Alcohol Certification
- ✚ Booking Events
- ✚ Customer Emergency Response
- ✚ Culinary Production
- ✚ Equipment Operation
- ✚ F&B Management
- ✚ Food Delivery, Handling & Safety
- ✚ Food Presentation
- ✚ Hospitality Practices
- ✚ Kitchen Waste Handling and Disposal
- ✚ Sanitation
- ✚ Social Media in the Workplace
- ✚ Sponsorship Processes
- ✚ Venue Security
- ✚ Vendor Processes
- ✚ Work Procedures

**COMPUTER SKILLS**

- ✚ Adobe (PDF, InDesign, Photoshop, Illustrator, etc.)
- ✚ AtTask
- ✚ Avature
- ✚ BOSS
- ✚ Customer Relationship Management

- ✚ CPM HR Systems
- ✚ HireVue
- ✚ INFOR Expense Management KRONOS
- ✚ MICROS/POS
- ✚ MS Office (Intermediate and Advanced)
- ✚ Reserve
- ✚ Reservation Systems
- ✚ Tapin2

**CONTINUOUS IMPROVEMENT**

- ✚ Change Management
- ✚ Leadership Development
- ✚ Team Management

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

# UNITE HERE! LOCAL 11

June 26, 2018

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

Re: Union Support for Employment Training Panel Funding

UNITE HERE Local 11 (the "Union") supports the proposed Employment Training Panel (ETP) for Levy Premium Foodservice at the Staples Center to provide various types of training opportunities the project will provide to the Staple Center's employees.

Sincerely,



Robin Rodriguez  
Organizing Director  
UNITE HERE Local 11

**MAIN OFFICE**  
464 S. Lucas Ave., Suite 201  
Los Angeles, CA 90017  
(213) 481-8530 • Fax (213) 481-0352

**GARDEN GROVE OFFICE**  
13252 Garden Grove Blvd., Suite 200  
Garden Grove, CA 92843  
(714) 750-4373 • Fax (714) 750-2683

**AIRPORT OFFICE**  
4634 W. Imperial Hwy.  
Inglewood, CA 90304  
(310) 671-0720 • Fax (310) 671-5021



**Training Proposal for:  
Medway Plastics Corporation  
Agreement Number: ET19-0272**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** M. Niquet

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Mfg & Food Processing 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: 185	U.S.:185	Worldwide: 185
<u>Turnover Rate:</u>	17%		
<u>Managers/Supervisors:</u> (% of total trainees)	11%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$93,288		\$0	\$0		\$93,288

In-Kind Contribution:	100% of Total ETP Funding Required	\$109,223
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Continuous Impr., HazMat, Mfg Skills, PL-Mfg Skills	156	8-200	0	\$598	\$17.54
				Weighted Avg: 23			

**Minimum Wage by County:** \$17.54 per hour for Los Angeles County.  
**Health Benefits:**  Yes  No This is employer share of cost for healthcare premiums – medical, dental, vision.  
**Used to meet the Post-Retention Wage?:**  Yes  No  Maybe  
 Up to \$2.50 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Production Worker		140
Administrative Staff		5
Supervisor/Manager		11

**INTRODUCTION**

Founded in 1974 and located in Long Beach, Medway Plastics Corporation (Medway), [www.medwayplastics.com](http://www.medwayplastics.com), is a family-owned business that specializes in custom injection molding, tooling and design. The Company uses recycled plastics to manufacture thermal plastics for various applications such as speaker housings, furniture parts, chair bases, bread trays, and medicine cabinets. Its customers include automotive, aircraft, aerospace, recreation, food service, and construction industries. The Company promotes recycling, using recycled plastics in its production process and Cogen power plant technology using natural gas as well as recycled cardboard and paper.

**PROJECT DETAILS**

This will be Medway’s fifth ETP Agreement, and the second within the last five years. Training provided under the prior ETP Agreement included new employee training, as well as new equipment and Lean processes training. Courses may be similar to the prior Curriculum; however, no trainee will receive duplicate training under this proposal.

Medway continues to evolve given the Company’s various markets and the increasingly demanding expectations from customers. Change is constant due to new industries, product development and innovation, along with changes in tooling, equipment, material formulations, supply agreements, systems, and procedures.

The continued evolution of the business requires a comprehensive training initiative. These initiatives range from material processing, statistics and quality management, technology

management, health & safety, material science, supply chain, business management, leadership development, risk management, and professional skills. These initiatives are a result of many factors and on-going changes. Past experiences and changes in the industry landscape has prompted the need for a more empowered, knowledgeable and skilled workforce and a corresponding improvement in all low-level/entry-level employees. Secondly, an ongoing reorganization and role re-defining will facilitate the development of employee knowledge, skills and abilities, ultimately enabling a targeted cultural shift of employees with improved value, accountability and productivity. Lastly, ongoing changes in material technologies, tooling technologies, process technologies, software and new equipment requires the Company to improve employee skill sets.

## **Training Plan**

Training will be delivered in a class/lab and Productive Lab setting. Training will take place at Medway's facility in Long Beach. Both in-house subject-matter experts and vendors will provide training.

**Business Skills:** Training will be offered to all occupations. Courses will include Schedule Development, Risk Management and Project Management. Training will provide staff with the skills to effectively interact with customers; better assess and meet customer expectations; manage goals and priorities; identify opportunities to increase sales; and improve presentation skills.

**Computer Skills:** Training will be offered to all occupations. Topics will include ERP-software, Web Management and Data Base Management. Training will ensure employees possess the technical knowledge to improve operational effectiveness.

**Continuous Improvement:** Training will be offered to all occupations. Topics will include Lean Manufacturing, Product Testing and Process Improvement. Trainees will develop better skills to improve processes and efficiency.

**Hazardous Materials:** Training will be offered to Production and Supervisors/Managers. Trainees will learn proper handling, disposal, storage and recycling of hydraulic oil.

**Manufacturing Skills:** This training will be offered to Production and Supervisors/Managers. Training will cover blueprint reading, motor operation, and process mapping to better manage supply chain issues and challenges.

## **Productive Laboratory (PL)**

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

Medway will train 106 production workers using PL on various production and manufacturing machines that include injection molding, quality testing machines, moisture analysis, heat stamps and robotics equipment. PL will improve efficiency, reduce costs, and improve turnaround times. Courses will include product testing and scientific molding.

PL training will complement Class/Lab training. Trainees will be assigned tasks based on job requirements once classroom training is completed. Trainees will produce products following production procedures that will be discussed with a qualified instructor prior to PL training. The majority of training will be at a trainer-to-trainee ratio of 1:1, however some topics will require 1:3 as some tasks require trainees to work in groups of three.



## Commitment to Training

Medway spends approximately \$145,000 annually in training. The Company will continue to provide mandatory and job-specific training during the term of the proposed Agreement, including orientation, sexual harassment prevention and computer-based training, at its own expense. ETP funds will not displace the existing financial commitment to training. Safety training will continue to be provided in accordance with all pertinent requirements under state and federal law.

### ➤ Training Infrastructure

The Company has qualified staff trainers and a vendor in place who will provide training. Medway also retained the services of Training Funding Source (TFS) for project administration. TFS will work with the Company's Office Operator and Human Resources personnel to assist in the enrollment process, training data collection and data entry.

## Temporary to Permanent Hiring

Medway intends to train 15 workers under Panel guidelines for the Temporary-to-Permanent program. The Company has retained these employees on a temporary basis, with the intention of hiring them into full-time, permanent positions after training. According to Medway, the average time for "converting" temporary workers into full-time permanent employment is 3 months. It is expected that these workers will receive employer-paid share-of-cost for healthcare premiums while on temporary status, and upon hire into full-time permanent employment.

Under Panel guidelines for the Temporary to Permanent program, these trainees must be eligible to participate in ETP-funded training pursuant to Unemployment Insurance Code Section 10201(c). Moreover, they cannot be enrolled as trainees until after they have been hired by Medway into full-time, permanent employment. Until they are so hired, retention and post-retention wage requirements cannot be satisfied and the Company will not receive progress payments.

## RECOMMENDATION

Staff recommends approval of this proposal.

## PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned	
				\$	%
*ET16-0114	Long Beach	08/03/15-08/02/17	\$160,560	\$95,833	(60%)
ET13-0370	Long Beach	05/13/13-05/12/15	\$81,430	\$81,430	(100%)

ET16-0114 – Medway was unable to deliver all training due to operational needs. Due to weak training administration, not all training was properly recorded. To improve training administration, Medway has added additional resources for training, including middle management for each department. There are approximately 12 to 14 trainers designated to training that will lead the training sessions and assist with training.

**DEVELOPMENT SERVICES**

Medway retained Training Funding Source in Seal Beach to assist with development of this proposal for a flat fee of \$3,900.

**ADMINISTRATIVE SERVICES**

Medway also retained Training Funding Source in Seal Beach to 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**

- Budget – Costing and Estimation
- Business Case Development
- Client Service Strategies
- Communication
- Finance for Non-Finance Managers
- Leadership
- Logistics and Transportation
- Presentation Skills
- Production and Inventory Management
- Project Management
- Retaining Talent
- Risk Management
- Situational Behavior/ Perception
- Schedule Development
- Supply Chain Management
- Team Building
- Visual Management
- Team Colaboration for Product Development

**COMPUTER SKILLS**

- Access
- Data Base Management
- Electronic Forms
- ERP-Software
- Mattec (EPICOR)
- Microsoft Office
- Pro-E
- Solid Works
- Voice Over Internet Protocol (VOIP)
- Web Management
- Windows Management

**CONTINUOUS IMPROVEMENT**

- Lean Manufacturing
- Machine Calibrations
- Product Testing
- Process Improvement
- Productivity Improvement
- Quality Improvement
- Recycle -Reuse-Refurbish
- Six Sigma

**HAZARDOUS MATERIALS**

- Hazardous Communication
- HazMat handling and Operations
- Storing Hazardous Materials
- Spill Prevention
- Water Filtration Process

**MANUFACTURING SKILLS**

- AC/DC Circuits
- BluePrint Reading
- Electromechanical Systems
- Equipment Operations
- Geometric Dimensioning/Tolerancing
- Hydraulics
- Machine Shop Operations
- Material Management
- Material Containment
- Materials Selection for Applications
- Manufacturing Processes
- Motor Operation
- PLC Motor Control
- Polymer Science and Material Properties
- Polymer Processing Properties
- Pneumatics
- Process Documentation
- Process Mapping
- Quality Control/Assurance/Auditing
- Schematics
- Scientific Molding
- Tool Operation
- Statistical Process Control

**Productive Lab Hours**

0-60

**MANUFACTURING SKILLS (Trainer-to-trainee ratio 1:3)**

- Machine Shop Operations
- Manufacturing Processes
- Process Documentation
- Scientific Molding
- Tool Operation
- Hydraulics
- Product Testing
- Mattec (EPICOR)

Safety Training will be limited to 10% of a trainee's total training hours.

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



**Training Proposal for:**

**Natera, Inc.**

**Agreement Number: ET19-0249**

**Panel Meeting of:** September 28, 2018

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

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Manufacturing (E) Services (G) Biotechnology and Life Science (54+) Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Mateo County	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 403	U.S.: 879	Worldwide: 879
<u>Turnover Rate:</u>	9.5%		
<u>Managers/Supervisors:</u> (% of total trainees)	6%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$199,290		\$0	\$0		\$199,290

In-Kind Contribution:	100% of Total ETP Funding Required	\$324,960
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Computer Skills, Cont. Improv., HazMat, Mfg. Skills, PL-Mfg. Skills	219	8 - 200	0	\$910	\$18.22
				Weighted Avg: 35			

**Minimum Wage by County:** \$18.22 per hour for San Mateo County.

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

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

Up to \$0.72 per hour may be added to meet the post-retention wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Operations/Technical Staff		200
Engineering/Quality/Research and Development Staff		7
Manager/Supervisor		12

**INTRODUCTION**

Founded in 2003, Natera, Inc. (Natera) ([www.natera.com](http://www.natera.com)) is a biotechnology genetic diagnostics laboratory and manufacturer creating non-invasive pre and postnatal tests for analyzing DNA. Its manufacturing facility/laboratory in California is located in San Carlos, the site for all proposed training.

This is Natera's first ETP Proposal. Natera's products include, but are not limited to: Panorama, a non-invasive prenatal test that screens for chromosomal abnormalities of a fetus typically with a blood draw from the mother; Vistara, a single-gene mutations screening test to identify single-gene disorders; Horizon carrier screening to determine carrier status for various genetic diseases that could be passed on to the carrier's children; and Spectrum pre-implantation genetic screening and diagnosis to analyze chromosomal abnormalities or inherited generic conditions during an in vitro fertilization cycle. Natera also provides the Anora "Products of Conception" test to analyze fetal chromosomes to understand the cause of miscarriage; as well as non-invasive paternity testing products to determine paternity. In addition, Natera offers Constellation; a cloud-based software product that enables customers to gain access through the cloud to the company's algorithms and bioinformatics in order to validate and launch tests.

Natera offers products through its direct sales force, as well as through a network of approximately 70 laboratory and distribution partners in the United States and internationally.

## **Need for Training**

Natera is expanding as demand for its products and services increases in the US and globally. While Natera has provided limited class and CBT training in the past, it lacks a structured training program in its operations. Training has focused largely on theory and knowledge, and has lacked the hands-on training and learning opportunities employees need to move into positions with higher expertise.

Implementing a robust Productive Lab (PL) training program has proven to be a challenge for the Company as it grows. Natera operates twenty-four hours a day, seven days a week with three shifts receiving customers' samples delivered several times throughout the seven days. Maintaining productivity and improving quality while delivering training has been a challenge in this fast-paced production environment. With this in mind, Natera has developed a reasonable and conservative ETP-funded training plan with an average of 35 training hours.

With ETP's assistance, Natera can provide more training opportunities enabling frontline workers to attend (PL) training, while newly hired employees backfill during training. Funding will assist Natera to promote more of its incumbent workforce, creating new jobs as workers advance, while back-filling these vacated positions. In summary, the primary goal will be a more robust training system that cross-trains incumbent workers, advances their skill level, introduces them to new technologies, and creates promotional opportunities for more frontline workers.

Finally, Natera has recently engaged in the Hoshin process, a strategic planning methodology (Plan-Do-Check-Act), used to create goals, assign measurable milestones, and assess progress against those milestones. This is the Company's first major effort to improve operating efficiencies in divisions across the Company. ETP will fund class/lab training, which will allow front-line employees, including supervisors and division management, to implement various continuous improvement principles and techniques through a common approach.

## **PROJECT DETAILS**

### **Training Plan**

This proposal funds training for frontline workers in San Carlos. Training will be delivered via Class/Simulated Lab and Productive Lab (PL) training as follows:

**Computer Skills:** Trainees in all occupations may receive training in LMS applications, materials and logistics software Natera's in-house software for data storage and processing using the cloud.

**Continuous Improvement:** Training will be offered to all occupations in measurement and analysis, compliance, and quality performance. Natera wants to make significant improvements to quality using Six Sigma, a new Lab Quality Improvement program, complaint management, and other decision-making systems. Supervisors/Managers will be provided with leadership and coaching skills.

**Hazardous Materials:** Training will be provided to Operations staff and includes emergency response and materials management of chemicals and waste.

**Manufacturing Skills** training will be provided to Operations and Technical staff who operate specialized equipment used in Natera's production facilities. Equipment includes DNA Sequencers, PCR (polymerase chain reactors), DNA analyzers, micro-assay analyzers, incubators, centrifuges, vacuum operated equipment, ventilation devices and biological safety cabinets. Training will cover all processes related to DNA accessioning and extraction to reduce (if not eliminate) the ergonomic hand-intensive risk factors. Trainees will also learn cross-functional production skills to use several different pieces of equipment, and related troubleshooting and testing techniques. Manufacturing skills training (class/lab and PL) will be taught by a combination of highly skilled internal subject matter experts and engineers.

## **PL- Manufacturing Skills**

Trainees may produce goods for profit as part of the PL training in the courses identified under the Curriculum. The instructor must be dedicated to training delivery during all hours of training. Training will be offered to Operations/Technical Staff. The proposed PL training will provide cross-training opportunities on procedures used throughout Natera's facilities. Thus, Natera is using PL training to deliver critical skills to its frontline workers.

Trainees may receive approximately 60 PL hours with a trainer-to-trainee ratio of 1:3 or less. Natera is requesting up to 60 hours for those individuals who are new to the Company. These potential new workers need more time to acclimate to Natera's specific systems and processes. All PL training will occur in a production/laboratory setting, conducted by a qualified trainer. During ETP-funded training, the trainers' time will be dedicated to the delivery of PL to the trainee. This training will provide specific bio-technology skills on the latest equipment, tools, and techniques to produce a variety of FDA-regulated products.

## **Commitment to Training**

ETP funds will not displace the existing financial commitment to training. The Company spends an estimated \$120,000 annually on training at its sole facility in California. Natera currently funds all training in basic new-hire orientation; OSHA and FDA-mandated safety regulations; rudimentary job skills; and basic desktop training in Microsoft Office. The Company also provides computer-based training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

### ➤ Training Infrastructure

Training will be administered by Natera LMS staff. Each Natera department has its own LMS administrator who administers and tracks all training. To supplement the LMS administrator, the operations group has recently hired a 'continuous improvement' manager who will also assist in scheduling, coordinating, and conducting training. At this time, Natera will use hard rosters to document all class/lab and Productive Lab training until such time as all training, including PL training on the production floor, is recorded in the LMS. The LMS system will have to be reviewed and approved by ETP prior to use for ETP record-keeping. The company has been informed of this requirement.

Training will be delivered by in-house instructors.

## **RECOMMENDATION**

Staff recommends approval of this proposal.

## **DEVELOPMENT SERVICES**

N/A

## **ADMINISTRATIVE SERVICES**

N/A

## **TRAINING VENDORS**

N/A



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

8-200

Trainees may receive any of the following:

**COMPUTER SKILLS**

- Advanced Desktop Applications
- Failure Mode and Effects Analysis (FMEA) for Software
- Utilization of 'the Cloud'
- L.I.M.S. (Laboratory Information Management System)
- J.I.R.A. Systems Dashboard

**CONTINUOUS IMPROVEMENT**

- Lean Management
- Continuous Improvement in Management
- Improving & Controlling
- Leader Standard Work
- Root Cause Analysis
- 5 Why Analysis
- Eight Deadly Wastes
- TAG Program
- Plan, Do, Check, Act
- 5S and Visual Workspace
- Improving Work Flow
- Total Productive Maintenance
- Measure System Analysis
- Advanced Measurement
- Control Planning
- Experimental Design
- Leadership/Coaching Skills

**HAZARDOUS MATERIALS**

- Hazardous Chemical and Waste Handling
- Emergency Response & Business Continuity
- Materials Management

**MANUFACTURING SKILLS**

- Production and Equipment Operations
- Cross-Training
- Lean Manufacturing Principles
- Good Manufacturing Procedures and Compliance
- Accessioning, Extraction and Process Development
- HIPAA Incident Response
- Reagent Quality Control Workflow
- Design Control
- Product Labeling
- Product Approval
- Risk Management

**Productive Lab (PL) Hours**

0-60

**MANUFACTURING SKILLS** (Ratio 1:3 or less)

- Equipment Operation
- Cross-Training
- Incoming Quality Control: Reagents
- Kit Assembly
- TECAN Equipment Operation
- Sample Accessioning and Production
- Extraction of cell free (cf) DNA
- Preimplantation Genetic Diagnosis
- Preimplantation Genetic Screening
- Products of Conception Processing
- LAB OPS Competency
- LAB OPS Proficiency
- Managing LIMS Accounts
- Continuous Monitoring of Lab Issues

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



**Training Proposal for:  
Quality Controlled Manufacturing, Inc.**

**Agreement Number: ET19-0240**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** San Diego

**Analyst:** M. Ibarra

**PROJECT PROFILE**

Contract Attributes:	Retrainee SB <100 Priority Rate	Industry Sector(s):	Manufacturing  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Diego	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: 96	U.S.: 96	Worldwide: 96
<u>Turnover Rate:</u>	9%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$99,840		\$0	\$0		\$99,840

In-Kind Contribution:	100% of Total ETP Funding Required	\$110,432
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 Priority Rate	Business Skills, Computer Skills, Cont. Improv., Mfg. Skills, PL - Mfg. Skills	80	8 - 200	0	\$1,248	\$17.03
				Weighted Avg: 48			

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:** \$17.03 per hour for San Diego County  
**Health Benefits:**  Yes  No This is employer share of cost for healthcare premiums – medical, dental, vision.  
**Used to meet the Post-Retention Wage?:**  Yes  No  Maybe  
 Up to \$2.50 per hour may be used to meet the Post-Retention Wage.

**Wage Range by Occupation**

Occupation Titles	Wage Range	Estimated # of Trainees
Administration		3
Production		58
Engineering		3
Supervisor/Manager		16

**INTRODUCTION**

Founded in 1978 and located in Santee, Quality Controlled Manufacturing, Inc. (QCM) ([www.qcmfginc.com](http://www.qcmfginc.com)) manufactures parts, components, and complex assemblies and specializes in precision machining of all metals including exotic alloys. The Company provides specialized manufacturing services to aerospace; space; power generation; Department of Defense (DOD); oil and gas; marine; heavy equipment; and the Federal Aviation Administration (FAA).

As part of its precision machining business, the Company also provides Computer Numerical Control (CNC) turning, milling, and grinding; conventional machining; welding; Electrical Discharge Machining (EDM); fabrication; inspection; engineering; Research and Development (R&D); aging/annealing; non-destructive testing (NDT); next higher assembly; and supply chain management. QCM is certified with the FAA and US Department of Transportation (DOT), and is authorized to operate an approved FAA repair shop station with Limited Accessory and Non-Destructive Testing ratings.

**PROJECT DETAILS**

This will be the third Agreement between QCM and ETP, the third in the last five years. In its previous ETP projects, QCM was able to provide its workers with various Computer, Continuous Improvement, and Manufacturing Skills training to meet a high level of quality assurance and

adaptability for industry and individual customer requirements, as well as support and manage expanding customer base and overall business growth. ETP funding also allowed the Company to develop a succession path to fill in behind exiting workers who have been with the Company for over 20 years and have retired. QCMI also provided cross-training for workers to perform job duties as well as promote to a higher level position.

The proposed training plan is driven by the Company's continued growth. In 2016, QCMI increased its fulltime employees by 21%. The Company projects an additional 7% increase in its workforce in the next two years as it plans to offer new services and expand into Painting, ChemFilm (industry using chemical conversion coating that is used to passivate aluminum) and Passivate (industry using chemical treatment for stainless steel and other alloys that enhances the ability of the treated surfaces to resist corrosion) markets. In addition, company representative reports that the aerospace sector continues to demand high standards including AS9100 certification and systems to ensure quality standards are maintained and continually improved not only at the management level but the entire supplier's organization.

In order to support new services for industry vertical integration and stringent customer requirements, QCMI is committed to continuous manufacturing and process improvements, using Six Sigma methodology and Lean manufacturing principles. In addition, the Company is committed to technological improvements, investing \$350K on a new paint booth, as well as chem film tanks and passivation tanks which will be implemented in November 2018.

## Training Plan

The proposed training plan will focus on a comprehensive training program that will support QCMI's overall business growth mentioned above. Training will also continue to focus on continuous improvement efforts and job growth opportunities as the Company continues its succession planning.

Some curriculum topics are repeated from prior ETP Agreements; however, the subject matter has been updated or revised, to ensure no duplication of training. Employees who participated in the past projects will receive new training in curriculum topics that will build upon the skill sets previously acquired. Some workers who were unable to participate in the Six Sigma Green Belt training provided in the previous project will now receive this training. Some employees will enter Phase II of Green Belt certification which includes quality clinic root cause and corrective action; and value stream mapping.

Training will be delivered via Class/Lab and Productive Lab training in the following skills:

**Business Skills** – Training topics include Business Writing, Business Analysis, Presentation Skills, Communication Skills, and Cost Benefit Analysis.

**Computer Skills** – Training topics include Mastercam, Microsoft Office, Enterprise Resource Planning (ERP), SolidWorks, Visual Fair, and Coordinate Measuring Machine (CMM) Programming.

**Continuous Improvement** – Training topics include Six Sigma Green Belt, Lean Manufacturing, Quality Systems, Team Building, Leadership Skills, International Traffic in Arms Regulations (ITAR), Internal Auditor, and Quality Clinics.

**Manufacturing Skills** – Training topics include Blueprint Reading, Machine Set Up, Machine Operation, Shop Inspection, Non-Destructive Testing, and First Article Inspection.

## Productive Laboratory

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

QCMI requests PL training in Manufacturing Skills topics including Machine Set up, Machine Operation, and Manufactured Part Inspection. PL training will be delivered to approximately 55 Production Staff trainees on a 1:1 trainer-to-trainee ratio. PL training will allow trainees to successfully utilize various manufacturing equipment such as manual lathe and mill machines, CNC lathe and mill machines, inspection CMM machines, NDT Horizontal Magnaflux Wet Bench, NDT Penetrant Station, manufacturing saws, grinders, conventional hone, and manufacturing RMI laser.

Trainees will receive up to 24 hours of PL training. During PL training, trainees will learn to set up and operate the machines, load materials, and complete entire process to ensure all procedures are completed accurately. In-house trainers have over 10 years of experience in their respective occupations. Trainers are responsible for directing the instructions as well as providing immediate feedback to the trainee as work is performed. Trainers will monitor and test trainees to determine if they are able to set up and operate machines.

## Commitment to Training

ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law. The Company spends approximately \$175K on training annually. In the past, QCMI has provided classroom, computer-based, one-on-one laboratory, and on-the-job training to its workforce.

### ➤ Training Infrastructure

QCMI designated its Human Resources Manager, who also successfully managed the first two ETP projects, to continue the management and administration of the proposed contract. The Manager will be responsible for scheduling training, enrolling trainees, and tracking their training hours in the ETP online systems. The Company's Chief Operating Officer/Chief Financial Officer will oversee the overall administration of the ETP project.

ETP training will begin upon contract approval and will be delivered at the Santee location by in-house trainers and vendors to be determined during the contract term.

## **RECOMMENDATION**

Staff recommends approval of this proposal.

## **PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET17-0176	Santee	8/13/16 – 8/12/18	\$96,096	\$0 (0%)*
ET14-0329	Santee	5/5/14 – 5/4/16	\$89,960	\$89,960 (100%)

\*The last day of training was 5/11/18. As of 8/24/18, QCMI documented 4,918 eligible training hours to equal more than 100% of the Agreement amount for 82 trainees who completed between 8 and 150 hours. The Company has submitted and received \$72,072 in progress payments and will submit the final closeout invoice once all trainees complete retention.

**DEVELOPMENT SERVICES**

N/A

**ADMINISTRATIVE SERVICES**

N/A

**TRAINING VENDORS**

To Be Determined

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

8 - 200 Trainees may receive any of the following:

**BUSINESS SKILLS**

- + Business Writing
- + Business Analysis
- + Presentation Skills
- + Communication Skills
- + Cost Benefit Analysis

**COMPUTER SKILLS**

- + Mastercam
- + Microsoft Office
- + Enterprise Resource Planning (ERP)
- + SolidWorks
- + Visual Fair
- + Coordinate Measuring Machine (CMM) Programming

**CONTINUOUS IMPROVEMENT**

- + Six Sigma Green Belt
- + Lean Manufacturing
- + Quality Systems
- + Team Building
- + Leadership Skills
- + International Traffic in Arms Regulations (ITAR)
- + Internal Auditor
- + Quality Clinics

**MANUFACTURING SKILLS**

- + Blueprint Reading
- + Machine Set Up
- + Machine Operation
- + Shop Inspection
- + Non-Destructive Testing
- + First Article Inspection

**Productive Lab Hours**

0 - 24

**MANUFACTURING SKILLS (1:1 training ratio)**

- + Machine Set Up
- + Machine Operation
- + Manufactured Part Inspection

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





**Training Proposal for:**  
**Rabobank, National Association**  
**Agreement Number: ET19-0244**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** Sacramento

**Analyst:** K. Mam

**PROJECT PROFILE**

Contract Attributes:	Retrainee SET	Industry Sector(s):	Financial Services  Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Counties Served:	Statewide	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 1,571	U.S.: 2,800	Worldwide: 40,000
<u>Turnover Rate:</u>	16%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$198,030		\$0	\$0		\$198,030

In-Kind Contribution:	100% of Total ETP Funding Required	\$241,080
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET	Business Skills, Commercial Skills, Computer Skills, Cont. Improv	410	8-200	0-20	\$483	\$30.36
				Weighted Avg: 21			

**Minimum Wage by County:** Job Number 1: \$30.36 SET Statewide Average Hourly Wage.

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

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

Up to \$2.50 per hour may be used to meet the Post-Retention Wage.

**Wage Range by Occupation**

Occupation Titles	Wage Range	Estimated # of Trainees
Administrative Support Staff		50
Professional Support Staff		230
Sales Staff		100
Technician		30

**INTRODUCTION**

Founded in 1972 and headquartered in Roseville, Rabobank, National Association (Rabobank) ([www.rabobankamerica.com](http://www.rabobankamerica.com)), a subsidiary of Utrecht America Holdings, is a leading financial service provider for food and agriculture financing and sustainability-oriented banking. The Company services individuals, businesses, and agricultural clients worldwide. Training under this proposal will be for its 10 locations throughout California.

**PROJECT DETAILS**

This will be Rabobank's third ETP Agreement, the third within the last five years. In this proposal, Rabobank will continue to build on its previous training of increasing customer base by upgrading employee skills, developing effective sales skills, and improving customer satisfaction. As business expands, Rabobank has a heightened need for job specific training including improving communication skills, sales skills, and business acumen. Staff must continuously train on development and soft skills to retain new and existing clients.

The Company has also upgraded internal systems such as a new Enterprise Resource Planning System, a new Learning Management System, and a new Enterprise Risk System that requires companywide training to ensure successful implementation. Training will allow the Company to improve business competencies while providing staff with skills to meet service expectations.

Although training topics are similar to those provided in the prior Agreement, trainees will not repeat the same training courses previously received.

### **Training Plan**

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

**Business Skills:** Training will be offered to all occupations. Training will focus on improving project management. Training topics include Workday Training, Processing Transactions, and Business Fundamentals.

**Commercial Skills:** Training will be offered to all occupations. Training will focus on improving workflow processes. Training topics include Accounting Fundamentals, Commercial Risk Management, and Sales Development.

**Computer Skills:** Training will be offered to all occupations. Training will focus on implementation of the Company's upgraded systems. Training topics include Learning Management System, Operating Systems, and Adobe Intuition.

**Continuous Improvement:** Training will be offered to all occupations. Training will focus on increasing customer satisfaction. Training topics include Communication Skills, Navigating Conflict and Difficult Conversations, and Inspire Development Program.

### **Computer-Based Training**

CBT will be provided to supplement class/lab training. All trainees will receive approximately 20 hours of CBT.

### **Commitment to Training**

Rabobank invests \$512,223 annually per facility for training that includes compliance, performance management, and company orientation. 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

Rabobank has a Director of Learning & Development and a HR Coordinator responsible for overseeing all training and administration. The Director will coordinate with leads at each training locations to ensure recordkeeping guidelines are met. Rabobank has a detailed training plan in-place and is ready to begin training upon approval.

### **Special Employment Training**

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

### **RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0385	Statewide	04/04/16 – 04/03/18	\$240,000	\$201,783 (84%)
ET12-0394	Statewide	05/07/12 – 05/06/14	\$240,000	\$113,278 (47%)*

\*ET12-0394 was Rabobank's first ETP Agreement. During the first year of the Agreement term, the Company faced challenges which included delivering and coordinating training to multiple locations, having a limited learning team Staff, and getting accustomed to ETP guidelines. Rabobank hired an additional six employees to help administer the project including scheduling and delivering training.

**DEVELOPMENT SERVICES**

N/A

**ADMINISTRATIVE SERVICES**

N/A

**TRAINING VENDORS**

To Be Determined

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

8-200 Trainees may receive any of the following:

**BUSINESS SKILLS**

- ✚ Business Fundamentals
- ✚ Consumer Fundamentals
- ✚ Integrated Banking Solutions Inquiries
- ✚ Microsoft Power BI Tools
- ✚ Mission, Vision, & Strategy
- ✚ Opening Business Accounts
- ✚ Opening Consumer Accounts
- ✚ Personal Checking 'How To'
- ✚ Processing Transactions
- ✚ Values & Practices
- ✚ Workday Training

**COMMERCIAL SKILLS**

- ✚ Accounting Fundamentals
- ✚ Hindsight Review
- ✚ Cash Flow
- ✚ Financial Writing
- ✚ Commercial Risk Management
- ✚ Sales Development
- ✚ Sales Leadership

**COMPUTER SKILLS**

- ✚ Adobe Intuition
- ✚ Baker Hill
- ✚ Learning Management System
- ✚ Microsoft Office Suite (Intermediate and Advanced Only)
- ✚ Operating Systems

**CONTINUOUS IMPROVEMENT**

- ✚ Building Better Teams
- ✚ Communication Skills
- ✚ Inspire Development Program
- ✚ Navigating Conflict and Difficult Conversations
- ✚ Performance Management
- ✚ Personal Leadership
- ✚ Writing for Results

**CBT Hours**

0-20

**COMMERCIAL SKILLS**

- ✚ Applink for Bank2Business (2 hours)
- ✚ Applink for Bank2Consumer (2 hours)
- ✚ Branch Employee Training Program (1 hour)
- ✚ Commercial Credit Policy & Procedures (2 hours)
- ✚ Commercial Risk Ratings (1 hour)

- ✚ Overview of the New Rabo Commercial Banking System (2 hours)
- ✚ Product Knowledge (2 hours)
- ✚ Rabobank Personal Checking Accounts (3 hours)
- ✚ TellerInsight Review (4 hours)
- ✚ Unconscious Bias (1.5 hours)

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



**Training Proposal for:  
State Center Community College District**

**Agreement Number: ET19-0270**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** Sacramento

**Analyst:** K. Mam

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate SB <100 HUA	Industry Sector(s):	Manufacturing Services  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Madera, Fresno, Kings, Tulare, Merced	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No United Food and Commercial Workers International Union 8 - Golden State		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	≤20%		

**FUNDING DETAIL**

<b>Program Costs</b>	+	<b>Support Costs</b>	=	<b>Total ETP Funding</b>
\$102,960		\$7,128 8%		\$110,088

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

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate HUA	Business Skills, Commercial Skills, Computer Skills	54	8-200	0	\$1,946	\$12.53*
				Weighted Avg: 70			
2	Retrainee Priority Rate HUA SB<100	Business Skills, Commercial Skills, Computer Skills	3	8-200	0	\$1,668	\$12.53*
				Weighted Avg: 60			

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

**Minimum Wage by County:** Job Numbers 1 and 2(HUA): \$12.53 per hour for Madera, Fresno, Kings, Tulare, and Merced Counties.  
**Health Benefits:**  Yes  No This is employer share of cost for healthcare premiums – medical, dental, vision.  
**Used to meet the Post-Retention Wage?:**  Yes  No  Maybe  
 Participating employers may use up to \$2.50 per hour in health benefits to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Maintenance Staff		12
Mechanics		16
Production Staff		16
Sales Staff		2
Warehouse Staff		8
<b>Job Number 2</b>		
Maintenance Staff		2
Mechanics		1

**INTRODUCTION**

Founded in 1964 and headquartered in Clovis, State Center Community College District (SCCCD) incorporates three community colleges and two educational centers: Fresno City College, Reedley College, Clovis Community College, Madera Community College Center and Oakhurst



Community College Center. SCCCD is a two-year community college that works directly with businesses within surrounding communities to enhance economic development by providing training to incumbent workers. This will be SCCCD's first ETP Agreement.

### **Union Support**

Mechanics, Maintenance, Production and Warehouse Staff are represented by United Food and Commercial Workers International Union 8 - Golden State and have provided a union letter of support. SCCCD is aware that training cannot commence until a union letter of support is submitted for respective members of a participating employer.

### **PROJECT DETAILS**

Due to the shortage of qualified skilled workers, SCCCD must train workers to enable companies to expand their production processes. Many organizations are experiencing significant growth and seek retraining to enhance employee skills. Training will focus on job skills necessary to increase safety and best practices for occupations in their respective industries.

Additionally, to meet future business needs, companies are moving towards new technology. New automation will require workers to receive technological and process improvement skills training necessary to be more efficient and productive. Furthermore, training will include software systems including CNC Programming/Operating and Autodesk Inventor to enhance trainees technology skills.

SCCCD's training plan will also focus on soft skills training including Communication Skills, Leadership, Time and Priority Management and Conflict Management. Training will ensure businesses have the skilled workforce required to meet the need of their clients and ETP-funded training will allow employers to bridge the skill gaps of incumbent staff.

### **Training Plan**

Training will be delivered via Class/Lab in the following:

**Business Skills:** Training will be delivered to all occupations to promote effective communication, have a better understanding of their industry, and improve business functions. Courses include Communication Skills, Customer Service Skills, Product Knowledge, Sales Strategies and Project Management.

**Commercial Skills:** Training will be provided to all occupations as related to job function to improve production, construction and facility efficiencies. Courses include Maintenance and Repairs, Programmable Logic Controllers, and Welding.

**Computer Skills:** Training will be provided to all occupations to enhance their skills in upgraded internal software systems. Training topics include Autodesk Inventor, Computer-Aided Design and Computer-Aided Machining.

### **High Unemployment Area**

All trainees work in a High Unemployment Area (HUA), with unemployment exceeding the state average by 25%. SCCCD is requesting a wage modification for 57 trainees (Job Numbers 1 and 2) from \$16.70 per hour to \$12.53 per hour.

## **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. Training includes new-hire orientation, sexual harassment prevention, best practices, first-aid, and legal compliance.

## **Trainer Qualifications**

Training for the proposed curriculum will be delivered by in-house specialists from the California Community College system and subject matter experts. Some training may also be provided by experienced trainers who work for participating employers. SCCCD may also use vendors as needed.

## **Marketing and Support Costs**

SCCCD is requesting 8% support costs to assist with recruitment, employer outreach, assessments of employer-specific job requirements, creation of unique training curriculums, and obtaining highly specialized trainers.

Marketing is done through online newsletters, social media, local press, personal on-site visits, telephone calls, emails, networking, and the college systems' websites

## **Training Agency Certification**

Training agency eligibility requires certification by an independent third-party, as required for the type of school and course of study. SCCCD is accredited by the Accrediting Commission for Community Junior Colleges (ACCJC) of the Western Association of Schools and Colleges (WASC).

## **Training Coordinator**

SCCCD assisted with need assessments and has a full-time training coordinator with the assistance of two support staff dedicated to administering the training program. SCCCD has also contracted with Sierra Consulting Services to help administer this project. The training coordinator assist with project 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**

Sierra Consulting Services assisted with development for a flat fee of \$7,500.00

**ADMINISTRATIVE SERVICES**

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

**TRAINING VENDORS**

To Be Determined

**Exhibit B: Menu Curriculum**

**Class/Lab Hours**

8-200 Trainees may receive any of the following:

**BUSINESS SKILLS**

- Business Fundamentals
- Change Management
- Collaboration
- Communication Skills
- Conflict Management
- Customer Service Skills
- Leadership
- Marketing Techniques
- Planning, Organizing and Goal Setting
- Product Knowledge
- Sales Strategies
- Time and Priority Management

**COMMERCIAL SKILLS**

- A/C Systems
- Automation Systems
- Electrical Systems
- Electronics
- Emissions
- Hydraulics
- Information Systems Applications
- Instrumentation
- Inventory Control
- Machining
- Maintenance and Repairs
- Motor Control
- Occupational Health & Safety
- Original Equipment Manufacturers and OEM Equipment
- Plans & Specifications
- Programmable Logic Controllers
- Quality Assurance
- Refrigeration, Components and Repair
- Safety/Hand Tools
- Warehousing
- Welding

**COMPUTER SKILLS**

- Autodesk Inventor
- Computer-Aided Design
- Computer-Aided Machining
- Computer Concepts
- CNC Programming/Operating
- HAAS CNC Programs
- MasterCam
- Microsoft Office (Intermediate/Advanced)

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: State Center Community College District  
Reference No: 18-0318

CCG No.: ET19-0270  
Page 1 of 3

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Ardagh Group

Address: 24441 Ave. 12

City, State, Zip: Madera, CA 93637

Collective Bargaining Agreement(s): Glass, Molders, Plastics Local 254 and United Steelworkers

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

Total # of full-time company employees worldwide: 23,000

Total # of full-time company employees in California: 499

Company: Azteca Milling L.P.

Address: 23865 Ave. 18

City, State, Zip: Madera, CA 93638

Collective Bargaining Agreement(s): United Food and Commercial Workers International Union 8 - Golden State

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

Total # of full-time company employees worldwide: 1,000

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

Company: BETTS

Address: 2843 South Maple Ave.

City, State, Zip: Fresno, CA 93725

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 550

Total # of full-time company employees in California: 350

Company: JBT FoodTech

Address: 2300 W. Industrial Ave.

City, State, Zip: Madera, CA 93637

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 9

Total # of full-time company employees worldwide: 3,300

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

**Participating Employers in Retrainee  
Multiple Employer Contracts**

Contractor's Name: State Center Community College District  
Reference No: 18-0318

CCG No.: ET19-0270  
Page 2 of 3

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Lyons Magnus

Address: 3158 E. Hamilton Ave.

City, State, Zip: Fresno, CA 93702

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 850

Total # of full-time company employees in California: 550

Company: Merced Screw Products

Address: 1861 Grogan Ave.

City, State, Zip: Merced, CA 95341

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 50

Total # of full-time company employees in California: 1,500

Company: NDS

Address: 851 N. Harvard Ave.

City, State, Zip: Lindsay, CA 93247

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 7,400

Total # of full-time company employees in California: 50

Company: O'Neill Vintners & Distillers

Address: 8418 S. Lac Jac Ave.

City, State, Zip: Parlier, CA 93648

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 205

Total # of full-time company employees in California: 185

**Participating Employers in Retrainee  
Multiple Employer Contracts**

Contractor's Name: State Center Community College District  
Reference No: 18-0318

CCG No.: ET19-0270  
Page 3 of 3

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Old Castle Enclosure Solutions

Address: 801 Pine Street

City, State, Zip: Madera, CA 93637

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 500

Total # of full-time company employees in California: 115

Company: Producers Dairy Foods, Inc.

Address: 250 E. Belmont Ave.

City, State, Zip: Fresno, CA 93701

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 505

Total # of full-time company employees in California: 505

Company: Wawona Frozen Foods

Address: 2202 S. Cedar Ave.

City, State, Zip: Fresno, CA 93725

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 400

Total # of full-time company employees in California: 400





United Food & Commercial Workers International Union, AFL-CIO, CLC

**Jacques Loveall**  
President  
International Vice President

Roseville  
(Headquarters)  
2200 Professional Dr.  
Roseville, CA 95661  
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Bakersfield, CA 93308  
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20 Constitution Dr.  
Suite C  
Chico, CA 95973  
(530) 895-0017  
(530) 895-1702 (fax)

Fresno  
3485 W. Shaw Ave.  
Suite 101  
Fresno, CA 93711  
(559) 271-1288  
(559) 276-2150 (fax)

Distillery, Wine & Allied  
And Wholesale Division  
3485 W. Shaw Ave.  
Suite 102  
Fresno, CA 93711  
(559) 226-0545  
(559) 226-6136 (fax)

Modesto  
2007 Yosemite Blvd.  
Modesto, CA 95354  
(209) 529-0596  
(209) 529-9571 (fax)

Redding  
3400 Bechelli Ln.  
Suite C  
Redding, CA 96002  
(530) 222-3905  
(530) 222-3973

Sacramento  
1930 Ninth St.  
Suite 208  
Sacramento, CA 95811  
(916) 503-8828

Santa Rosa  
940 Hopper Ave.  
Santa Rosa, CA 95403  
(707) 546-1384  
(707) 546-4806 (Fax)

May 10, 2018

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

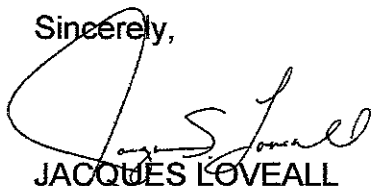
Re: **Participation in the California Employment Training Panel**

Dear Employment Analyst:

As the collective bargaining representative of the employees of Azteca Milling LP, UFCW 8 – Golden State supports the participation of our members in the training to be provided in the ETP project.

As the Local Union representing employees of Azteca Milling LP, UFCW 8 also supports the training as something that we do not offer internally to our members as it is training specific to the individual employment environment and outside of our membership's qualifications.

Sincerely,



JACQUES LOVEALL

JL:fl

cc: Joe Ciotti





**RETRAINEE - JOB CREATION**

**Training Proposal for:**

**Tarlton and Son Inc.**

**Agreement Number: ET19-0245**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** Sacramento

**Analyst:** C. Kaiser

**PROJECT PROFILE**

Contract Attributes:	Priority Rate Job Creation Initiative HUA SET	Industry Sector(s):	Construction  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Fresno, Orange, San Luis Obispo	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Carpenters Training Committee for Northern California; ABC Northern California Chapter; and Southwest Carpenters Training Fund		
Number of Employees in:	CA: 233	U.S.: 233	Worldwide: 233
<u>Turnover Rate:</u>	14%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$186,030		\$0	\$0		\$186,030

In-Kind Contribution:	100% of Total ETP Funding Required	\$200,000
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate SET HUA	Business Skills, Commercial Skills, Computer Skills, Cont. Improv., Mgmt. Skills, OSHA 10/30, PL- Commercial Skills	160	8-200	0	\$910	*\$12.53
				Weighted Avg: 35			
2	Retrainee Priority Rate SET	Business Skills, Commercial Skills, Computer Skills, Cont. Improv., Mgmt. Skills, OSHA 10/30, PL- Commercial Skills	33	8-200	0	\$910	\$22.77
				Weighted Avg: 35			
3	Retrainee Job Creation Priority Rate SET HUA	Business Skills, Commercial Skills, Computer Skills, Cont. Improv., OSHA 10/30, PL- Commercial Skills	8	8-200	0	\$1,300	*\$11.00
				Weighted Avg: 50			

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

**Minimum Wage by County:** Job Number 1: \$12.53 per hour for Fresno County; Job Number 2: \$22.77 per hour for San Luis Obispo and Orange Counties; Job Number 3: \$11.00 per hour for Fresno County.

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

**Used to meet the Post-Retention Wage?:**  Yes  No  Maybe  
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
<b>Job Number 1:</b>		
Administrative Staff		9
Drywall Lathers		78
Estimators		6
Frontline Managers		5

Painters		24
Plasterers		8
Project Managers		10
Tapers		12
Yard Staff		8
<b>Job Number 2:</b>		
Administrative Staff		1
Drywall Lathers		12
Frontline Managers		3
Plasterers		16
Project Managers		1
<b>Job Number 3:</b>		
Drywall Lathers		3
Estimators		1
Painters		2
Plasterers		2

## **INTRODUCTION**

Founded in 1977 and headquartered in Fresno CA, Tarlton and Son Inc. (Tarlton) ([www.tarltonandson.com](http://www.tarltonandson.com)) offers construction services including lathing, plaster, drywall, painting, scaffolding, metal studs, and Exterior Insulation Finishing System (EIFS) throughout California. Contracts include Hotel Californian, UC Santa Barbara Student Housing, Fresno Yosemite International Airport, Hollister Courthouse, Yuba City Courthouse, and Valley Childrens Hospital. Training will be conducted at the Fresno, Grover Beach, and Anaheim locations. This is Tarlton's first ETP Agreement.

This proposed training project is supported by Carpenters Training Committee for Northern California; ABC Northern California Chapter; and Southwest Carpenters Training Fund. These unions have submitted letters of support for training of their respective members.

## **PROJECT DETAILS**

As construction projects become larger and more complex, Tarlton wants to ensure the Company and its employees can continue keeping a competitive advantage over their competition. To meet this goal, Tarlton will train all staff to improve process efficiencies focusing on lowering costs, reducing construction times, and improving customer satisfaction. Training on LEAN Processes, Quality Control, and job specific training will ensure trainees receive the knowledge they need to be efficient in their occupation and deliver high quality craftsmanship.

Additionally, Tarlton is committed to creating promotional opportunities for its labor force and has created a training plan focused on increasing skill sets and creating a working environment that encourages retention and promotions. Training in Effective Communication, Leadership, Best Practices, and Customer Service will give trainees transferable skills while promoting the Company's culture.

## Retrainee - Job Creation

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

Tarlton is experiencing a growth rate of 12% in 2018 and the Company expects an additional 8% in growth for 2019. To keep up with this growth, the demand for service, and the increasing complexity of their contracts, Tarlton has committed to hiring 8 new employees (Job Number 3). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into “net new jobs” as a condition of contract.

## Training Plan

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

**Business Skills:** Training will be offered to all occupations. Training will focus on customer service and project management. Training topics include Account Development, Project Management, and Accounting Systems.

**Commercial Skills:** Training will be offered to Drywall Lathers, Estimators, Frontline Managers, Painters, Plasterers, Project Managers, Tapers, and Yard Staff. Training will focus on product knowledge and best practices. Training topics include Bracing Buildings, EIFS Training, and Green Building Practices.

**Computer Skills:** Training will be offered to all occupations. Training will focus on software specific training. Training topics include Plexis and WinBid Estimating software systems.

**Continuous Improvement:** Training will be offered to all occupations. Training will focus on quality control. Training topics include LEAN Processes and Team Building.

**Management Skills:** Training will be offered to Frontline Managers. Training will focus on leadership. Training topics include Leadership and Vistage Management Training.

## Certified Safety Training

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

## Productive Lab- Commercial Skills

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

This training will be at a much slower pace than regular field construction and will provide significantly higher defects as trainees gain proficiency. Training will be conducted by a subject matter expert at the Company’s facility as well as job sites. Once the training is complete, the trainer will confirm the trainee’s competency. PL training is for approximately 20 trainees including Drywall Lathers, Painters, Plasterers, and Tapers. Training topics include Commercial Paint

Application, Harness Training, and Scaffolding Assembly. Trainees will learn on the job skills, best practices and the correct techniques to be competent in their field of work.

Training will be under constant supervision with a 1:2 trainer-to-trainee ratio as this training is typically conducted in teams of two.

### **Commitment to Training**

The annual training budget for Tarlton is approximately \$25,000. The majority of the training will be provided to all employees and includes updated processes, continuing employee development, and all job specific 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

Training will be provided by qualified in-house trainers and vendors as needed. Tarlton has designated their Human Resources Manager and the Human Resources Assistant to oversee the ETP Contract as well as a designated person at each location. In addition to the assigned staff members, Tarlton has also retained the services of a third-party administrator who has extensive ETP experience to assist with administration.

### **SET/HUA**

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 and 3 work in a High Unemployment Area (HUA). This is a region with unemployment exceeding the state average by 25%, under the Panel's standards. The determination of HUA status is based on unemployment data from the Labor Market Information Division of the Employment Development Department. The Company's location in Fresno County qualifies for HUA status under these standards.

These trainees qualify for the ETP Minimum Wage rather than the Statewide Average Hourly Wage. The Panel may modify the ETP Minimum Wage for these trainees by up to 25% if post-retention wages exceed the start-of-training wages. Tarlton is requesting a wage modification from \$22.77 to \$12.53 for Job Number 1 and from \$13.66 to \$11.00 for Job Number 3.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **DEVELOPMENT SERVICES**

Tarlton retained Strategic Business Solutions, LLC in Visalia to assist with development of this proposal for a flat fee of \$7,550.

**ADMINISTRATIVE SERVICES**

Strategic Business Solutions, LLC 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:**

- Account Development
- Accounting Systems
- Business Writing
- Customer Service
- Effective Communication
- Estimating and Bid Generation
- Project Management
- Strategic Planning

**COMMERCIAL SKILLS:**

- Bracing Buildings
- Commercial Door Installation
- Construction Equipment Operation
- Drywall, Tape & Texture Practices
- EIFS (Exterior Insulation and Finish System) Training
- Green Building Practices
- Harness Training
- Ladder Training
- Lath & Plaster Practices
- Material Handling Equipment Training
- Metal Stud Installation
- Painting Material & Technique Practices
- Scaffolding Erection and Assembly
- Site Preparation and Staging

**COMPUTER SKILLS:**

- Advanced Microsoft Office Applications
- AutoCAD
- AutoCAD 3D
- Plexis
- WinBid Estimating

**CONTINUOUS IMPROVEMENT:**

- Cross Training
- LEAN Processes
- Quality Control
- Team Building

**MANAGEMENT SKILLS (Managers Only)**

- Leadership
- Vistage Management Training

**OSHA 10/30:** (Certified OSHA Instructor)

- OSHA 10
- OSHA 30



**Productive Lab**

0-60

**COMMERCIAL SKILLS: (Ratio 1:2)**

- Commercial Door Installation
- Commercial Paint Application
- Construction Equipment Operation
- Drywall, Tape, & Texture
- Harness Training
- Ladder Training
- Lathing & Plastering
- Material Handling Equipment
- Metal Stud Installation
- Scaffolding Assembly

Safety Training cannot exceed 10% of total training hours per-trainee. This cap does not apply to OSHA 10/30.

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



CARPENTERS  
TRAINING  
COMMITTEE  
FOR  
NORTHERN  
CALIFORNIA  
A Joint Labor & Management  
Sponsored Training Program  
Mark Fuchs, Executive Director

Administrative Offices  
2350 Santa Rita Road  
Pleasanton, CA 94566-4135  
Tel: 925.462.9640 Fax: 925.462.8307  
[www.ctcnc.org](http://www.ctcnc.org)

July 25, 2018

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

Re: Support for ETP Funding

To Whom It May Concern:

This letter will confirm support by the Carpenters Training Committee for Northern California for *Tarlton & Son, Inc., Fresno, California*, proposed training to be submitted to Employment Training Panel. The training program will provide our members with skills needed to meet workforce demands and provide a secure environment for the future.

Please feel free to contact me if more information is needed, 925/462-9643 or [mfuchs@ctcnc.org](mailto:mfuchs@ctcnc.org).

Sincerely,

Mark E. Fuchs  
Executive Director



July 24, 2018

To Whom It May Concern:

ABC NorCal supports the ETP Training Program at Tarlton And Son, Inc.

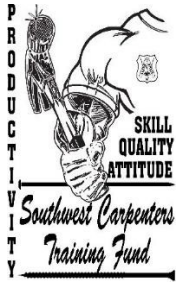
ABC NorCal operates a painting apprenticeship program approved by the California Department of Industrial Relations, Division of Apprenticeship Standards (DAS) and by the Department of Labor, Office of Apprenticeship. Tarlton and Son, Inc. is approved to train ABC NorCal apprentices.

The ABC NorCal apprentices gain on-the-job training by working under the direct supervision of a journey-worker. The training program will provide the journey-workers employed by Tarlton and Son, Inc. skills needed for them to excel as craft professionals and as a result, would also benefit the ABC NorCal apprentices who are trained by these journey-workers on the jobsite.

Should you have any further need for clarification, or if I can answer any questions you may have, please contact me at (925) 960-8504.

Sincerely,

Sagit Woodbury  
Apprenticeship Director



# SOUTHWEST CARPENTERS TRAINING FUND

3250 E. Shelby Street, Suite 210

Ontario, California 91764-6584

Telephone: (213) 739-9339

[fundoffice@swctf.org](mailto:fundoffice@swctf.org) ▪ [www.swctf.org](http://www.swctf.org)

July 31, 2018

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

Re: Support for ETP Funding

As Director of the Southwest Carpenters Training Fund, I am sending this letter in support of the Employment Training Panel application submitted by Tarlton and Sons, Inc. to provide needed training to their employees.

If any additional information is needed, please email me at [lonitveros@swctf.org](mailto:lonitveros@swctf.org)

Sincerely,

Louis A Ontiveros  
Executive Director



**Training Proposal for:**

**The Gap, Inc.**

**Agreement Number: ET19-0262**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** San Francisco Bay Area

**Analyst:** S.Wang

**PROJECT PROFILE**

Contract Attributes:	Retrainee	Industry Sector(s):	Retail Services Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Counties Served:	San Francisco	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: 6,648	U.S.: 104,441	Worldwide: 125,539
<u>Turnover Rate:</u>	7%		
<u>Managers/Supervisors:</u> (% of total trainees)	0%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$171,120		\$0	\$0		\$171,120

In-Kind Contribution:	100% of Total ETP Funding Required	\$230,640
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee	Business Skills, Computer Skills, Contin. Improv.	155	8-200	0	\$1,104	\$18.22
				Weighted Avg: 48			

**Minimum Wage by County:** \$18.22 for 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
Product Staff (Inventory Staff, Design, Production, Marketing, Merchandising)		155

**INTRODUCTION**

Founded in 1969 and headquartered in San Francisco, The Gap, Inc. (Gap) (<https://www.gap.com/>) designs, merchandises, markets, and retails clothing and accessories for men, women and children. From a single store, Gap has grown to a global fashion business with five brands – Gap, Banana Republic, Old Navy, Athleta and Intermix. Gap also has international offices in London, China, Japan and Canada. Gap's clothes are available in 90 countries worldwide through its 3,300 retail stores and online website. This will be Gap's fourth ETP Agreement, first in the last five years.

Gap will act as the contract lead for the following participating subsidiaries all located in San Francisco: Athleta, Inc. (designs/merchandises Athleta brand; GPS Services, Inc. (provides management services for all Gap brands); and Gap Services, Inc. (designs products and related technical support services).

**Green/Clean Operations**

Since 2015, Gap has been an environmentally friendly company in the use of greenhouse gas emissions within their facilities. This includes installing LED light at 1,000 facilities and updating its HVAC systems. The Company achieved a 37% reduction at the end of 2015. Gap has set a new goal of a 50% reduction of greenhouse gas emissions and an 80% diversion in landfill waste throughout all facilities and production operations by 2020.

## **PROJECT DETAILS**

To compete in today's global marketplace and to meet customer demands, Gap must train 155 Product Staff to improve business efficiency and decision-making. In the apparel industry, the average product to market timeline is nine months, which includes 50% design and development, 35% production, and 15% transportation. Some apparel industry can complete this task within 3 months. To compete, Gap is evolving its practices to speed up its pipeline by seeking new ideas into the designing and conducting experiments to test customer satisfactory of its products. Trainees must learn the product life-cycle, understanding the production, design, merchandising and inventory management procedures. In addition, Gap is implementing a new and improved inventory tool so staff can learn new ways of working, allowing for a more fluid process to serve the customers.

### **Training Plan**

Training will be delivered via class/lab and E-learning in the following:

**Business Skills:** Training will be offered to all occupations. Staff with design and production roles will train in Trendalytics, Visual Merchandising, Understanding your customers to learn the tools and skills for designing products. Staff with inventory management roles will train in Inventory Management Theory, Product Lifecycle and Responsive Operations. This training will ensure efficient and effective supply and delivery to customers. Staff with merchandising roles will train in Digital Merchandising, Driving Sales with Color and Market Share Analysis. This training develops the skills for merchandising via an omnichannel model and meeting trends.

**Computer Skills:** All occupations will train in NOVA, Global Forecast Tool, Price Optimization and Business Intelligence. These topics will provide data analysis and forecasting tools needed to improve operational performance to meet business changes

**Continuous Improvement:** All occupation will train in MindGym and Situational Self Leadership to assist in performance and organizational growth for the business.

### **Commitment to Training**

Gap's annual California training budget is approximately \$880,000. Training includes new hire orientation, regulatory training, management training, retail stores and distribution training, and diversity training.

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

#### ➤ Training Infrastructure

Gap is ready to start training upon approval. The Senior Director of Learning and two Administrative Staff will oversee training. Gap has also retained Economic Incentives Advisory Group (EIAG) to assist with administrative duties. Training will be delivered by in-house experts and vendors as needed at the San Francisco facility.

### **LMS**

Gap will utilize a Learning Management System (LMS) and paper rosters to track all training. Staff has reviewed and approved the LMS.

## **RECOMMENDATION**

Staff recommends approval of this proposal.

**DEVELOPMENT SERVICES**

EIAG in Phoenix, Arizona assisted with development for a flat fee of \$14,500.

**ADMINISTRATIVE SERVICES**

EIAG will also perform administrative services for a fee of 8.5% of payment earned.

**TRAINING VENDORS**

MindGym in New York, NY will provide Continuous Improvement training for a fee of \$9,100. Other trainers will be identified for ETP record-keeping purposes, as they are retained.



## Exhibit B: Menu Curriculum

### Class/Lab and E-Learning Hours

8-200 Trainees may receive any of the following:

#### **BUSINESS SKILLS**

- Analyzing Weekly Business
- Art of Storytelling
- BazaarVoice
- Business Bootcamp (BB)
  - BB: Analyzing Weekly Business
  - BB: Business Presentation
  - BB: Business Reporting
  - BB: Gap, Inc. 101
  - BB: Product Lifecycle
  - BB: Responsive Buying
  - BB: Retail Math Lab
  - BB: Welcome to Business Bootcamp
- Booking Management
- Building a Seasonal Assortment Strategy
- Business Reports
- Business Roundtables
- Buy Plan Reconciliation
- Communicating Product Performance
- Consumer Behavior
- Creating a Compelling Assortment
- Customer & Trend Board
- Design Thinking
- Design Training
- Developing Category Strategies
- Digital Marketing
- Digital Merchandising
- Digital Production + Operations
- Driving Sales with Color
- Establishing Financial Targets
- Fabric, Costing & Quality
  - Denim
  - Knit
  - Performance Knit
  - Sweater
  - Woven
- Fashion & Basic Buy Plan
- Garment Costing
- Inventory Management (IM)
  - IM: Theory
  - IM: Buy Planner
  - IM: Driving Allocation w/ Demand Forecast
  - IM: Reorders & Advanced
  - IM: Vendor Managed Inventory & E2Open
  - IM: Vendor Managed Inventory Overview

- IM: Buy Plan & Reconciliation Theory
- IM: Establishing Financial Targets Theory
- IM: Fashion Basic Buy Planning Theory
- IM: In-Season Business Management Theory
- IM: Midsight/Hindsight Theory
- IM: Monthly Forecasting
- IM: Prep for Release Theory
- IM: Pricing Strategies
- IM: Product End to End Booking Management
- IM: Receipt Management
- IM: Size & Pack Theory
- IM: Theory of Inventory Management
- Import Compliance
- Inventory Management Training
- Key Drivers: Assorting & Buy Planning
- Market Share Analysis & Opportunity Sizing
- Merchant Training
- Midsight/Hindsight
- Open to Buy
- Pricing Strategies
- Product End to End Global Assort Tool Training
- Product End to End Global Assortment for Merchants
- Production Roundtable
- Production Training
- RA: Responsive Operations Theory
- Receipt Management
- Sustainability
- Responsive Buying
- Responsive Buying Operations
- Responsive Supply Chain
- Retail Math Lab
- Rotation Management Program Training
- Sizing, Rating and Attributing Assortment
- Strategic Costing Analysis
- Strategy
- StyleSage
- Testing & Product Quality
- Theory Of Sizing Packing & Allocation Strategies
- Tradestone (Bamboo Rose) Costing Tool
- Trendalytics
- Trendspotting
- Understanding Your Customer
- Visual Merchandising Overview

#### **COMPUTER SKILLS**

- Business Bootcamp
  - BB: Excel for Retail
  - BB: NOVA Practice Lab
- Buy Planning Tool Training
- Excel for Retail (Learn It) (Advanced/Intermediate)
- Excel Practice Lab (Advanced/Intermediate)

- Inventory Management
  - IM: Onboarding & Sunsetting
  - IM: Buy & Assortment Management Developing the Plan 1
  - IM: Buy & Assortment Management Developing the Plan 2
  - IM: Buy & Assortment Management In-Season
  - IM: Buy & Assortment Management Intro & Navigation
  - IM: Buy & Assortment Management Prep for Release
  - IM: Buy & Assortment Management Refining the Plan
  - IM: Gap Clarity
  - IM: Product End to End Global Reforecast Tool
  - IM: Planning & Forecasting Tool In-Season - Global
  - IM: Planning & Forecasting Tool In-Season – Regional
  - IM: POST
  - IM: Price Optimization
  - IM: Product End to End Business Intelligence Reports
  - IM: Product End to End Global Buy Plan 1
  - IM: Product End to End Global Buy Plan 2
  - IM: Product End to End Global Buy Plan 3
  - IM: Product End to End New Flow
  - IM: Product End to End Receipt Manager
  - IM: Product End to End Replenishment
  - IM: Product End to End Size & Pack
    - IM: Size Profiler
- NOVA Lab
- Planning & Forecasting Tool
- Product end to end PETE Price & Event Management
- Retail Academy: Essbase

### **CONTINUOUS IMPROVEMENT**

- MindGym
  - Accountability
  - Change Management
  - Coaching
  - Decision Making
  - Performance Management
  - Problem Solving
  - Process Improvement
  - Teambuilding
- Situational Self Leadership

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



**Training Proposal for:**  
**The Mochi Ice Cream Company**  
**Agreement Number: ET19-0261**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** M. Reeves

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate HUA	Industry Sector(s):	Mfg & Food Processing (E) Manufacturing (33)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 124	U.S.:124	Worldwide: 124
<u>Turnover Rate:</u>	14%		
<u>Managers/Supervisors:</u> (% of total trainees)	16%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$116,480		\$0	\$0		\$116,480

In-Kind Contribution:	100% of Total ETP Funding Required	\$120,000
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate HUA	Computer Skills, Continuous Imp., Mfg. Skills	112	8-200	0	\$1,040	*\$13.25
				Weighted Avg: 40			

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

**Minimum Wage by County:** \$13.25 per hour for Los Angeles County (HUA).  
**Health Benefits:**  Yes  No This is employer share of cost for healthcare premiums – medical, dental, vision.  
**Used to meet the Post-Retention Wage?:**  Yes  No  Maybe  
 Although health benefits are provided, they are not being used to meet Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Production Staff		44
Operations Support/Office Staff		17
Warehouse/Shipping Staff		5
Maintenance Staff		16
Quality Assurance Staff		12
Manager/Supervisor		18

**INTRODUCTION**

Founded in 1910, The Mochi Ice Cream Company (Mochi) ([www.mymomochi.com](http://www.mymomochi.com)) manufactures ice cream filled rice dough treats. Mochi Ice Cream flavors include Salted Caramel, Vanilla Bean, Mint Chocolate Chip, Sweet Mango, Ripe Strawberry, Cookies & Cream, Green Tea, and Double Chocolate. Headquartered in the City of Vernon, Mochi’s customers include restaurant distributors and retail establishments such as Whole Foods Market, Albertsons, Walmart, Kroger/Ralphs, Costco, and Sam’s Club.

**PROJECT DETAILS**

Mochi is in the process of expanding its existing business and gauging opportunities for growth into new markets. The Company recently invested approximately \$4 million in new equipment and plant modifications, including more than \$2 million in ice cream manufacturing machines. The Company’s current and anticipated growth requires continued system improvements, policy and procedure updates, and employee skills upgrade. Along with training on new equipment, the proposed training will focus on the implementation of Lean Manufacturing principles, frontline leadership skills, resource planning, equipment operation and maintenance, and good manufacturing practices. This training will enable Mochi to introduce process improvements designed to enhance operational efficiency and product quality.

## **Training Plan**

Training will take place at Mochi's facility in Vernon. Course instruction will be delivered via Class/Lab by a combination of in-house subject-matter experts and vendors.

**Computer Skills:** Training will be provided to all occupations. Mochi will be introducing tablets to the production environment. Employees will learn how to track and report data, manage schedules, and monitor problems utilizing mobile device technology. Training on various business software solutions will assist the Company's transition from a paper-based to an electronic-based organization.

**Continuous Improvement:** Training will be provided to all occupations. Training will improve efficiencies with emphasis on Lean enterprise, process analysis, and leadership skills. Training will ensure proper quality management and assurance systems are in place.

**Manufacturing Skills:** Training will be provided to Production Staff, Maintenance Staff, Quality Assurance Staff, and Warehouse/Shipping Staff. Trainees will gain the skills and knowledge to operate and maintain equipment, ensure product quality, and implement best practices in product production and food safety. The Company also needs to provide cross training to improve production flexibility and capacity.

## **High Unemployment Area**

Trainees in Job Number 1 work in Vernon, a High Unemployment Area (HUA) with unemployment exceeding the state average by 25%. The Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. Mochi is requesting a wage modification from \$17.54 per hour to \$13.25 per hour.

## **Commitment to Training**

Mochi spends approximately \$87,000 annually on training. Company-funded training includes new hire onboarding, regulatory topics, and instructional on-the-job training as needed. Safety training is provided in accordance with all pertinent requirements under state and federal law.

### ➤ Training Infrastructure

Mochi's Human Resource Director will oversee project administration including training coordination, scheduling, and tracking/reporting. The Company has also retained an experienced administrative consultant to ensure that all training adheres to ETP requirements.

## **RECOMMENDATION**

Staff recommends approval of this proposal.

## **DEVELOPMENT SERVICES**

Kirkpatrick Enterprises International (KEI) in Valencia assisted with development at no charge.

## **ADMINISTRATIVE SERVICES**

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

## **TRAINING VENDORS**

To Be Determined

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

8 – 200

Trainees may receive any of the following:

**COMPUTER SKILLS**

- Intermediate/Advanced Database Techniques, Word Processing, Spreadsheets
- Warehouse & Inventory Systems
- Logistics Software
- Enterprise Resource Planning (ERP)
- Microsoft (MS) Office Suite (Intermediate/Advanced)

**CONTINUOUS IMPROVEMENT**

- Lean Enterprises
- Process Analysis, Root Cause
- ERP/DRP
- Teamwork and Problem Solving
- Leadership Skills for Frontline Workers
- Statistical Process Control
- Six Sigma (Green Belt)
- ISO 9000 and ISO 14400

**MANUFACTURING SKILLS**

- Manufacturing Operations
- Equipment Operation and Maintenance
- Good Manufacturing Practices
- Food Safety
- Sanitation
- Product Handling
- Cross-Training (Production Equipment/Skills)

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

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



**Training Proposal for:  
AeroVironment, Inc.**

**Agreement Number: ET19-0257**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** E. Wadzinski

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Services (G) Prof, Scientific, and Tech (54)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles and Ventura	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 640	U.S.:684	Worldwide: 684
<u>Turnover Rate:</u>	4%		
<u>Managers/Supervisors:</u> (% of total trainees)	5%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$364,000		\$0	\$0		\$364,000

In-Kind Contribution:	100% of Total ETP Funding Required	\$558,600
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Continuous Impr, HazMat, Manufacturing	350	8-200	0-100	\$1,040	\$16.70
				Weighted Avg: 40			

**Minimum Wage by County:** \$17.54 per hour for Los Angeles County and \$16.70 per hour for Ventura 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  
\$0.49 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Engineering/Information Technology/Technician		198
Operations		115
Warehouse		18
Managers		19

**INTRODUCTION**

Founded in 1971 and headquartered in Monrovia, AeroVironment, Inc. (AeroVironment) ([www.avinc.com](http://www.avinc.com)) primarily designs, develops, manufactures and supports the operation of Unmanned Aircraft Systems (UAS) and tactical missile systems. These systems provide situational awareness, multi-band communications, force protection and other mission effects.

Primary customers are the United States Department of Defense and dozens of allied nations. Customers also consist of law enforcement and first responders. Training will take place at the Company's five Simi Valley locations, and the Company headquarters in Monrovia. This will be AeroVironment's first ETP Agreement.

**PROJECT DETAILS**

The evolution of unmanned aerial vehicles, more commonly known as drones, is developing at a rapid pace. Not only is the technology progressing, but regulations are being adapted to encourage wider adoption. AeroVironment must stay on the cutting edge of technology, product development and manufacturing to continue to compete in the industry. Thus, the Company is challenged to improve safety and quality of products and increase efficiency and productivity of employees. For this, the Company must improve several components of its supply chain (Portfolio Lifecycle Management, Planning, and Operations) and a series of best practices need to be

implemented to ensure increased productivity and consistency including Lean processes, process improvement initiatives, design for Six Sigma, 5S, and logistics. Training will allow the Company to continue to develop new, groundbreaking products to support contract awards from the United States Army.

Additionally, AeroVironment was recently awarded a contract to design and develop pieces of the Mars helicopter drone. Training for employees will increase skillsets and improve collaboration skills while working with NASA's Jet Propulsion Laboratory in La Cañada-Flintridge.

## **Training Plan**

AeroVironment training delivery methods will include Class/Lab, E-Learning and Computer-Based Training (CBT). Training will be provided by in-house trainers or vendors, as needed. E-Learning will be used to provide training at multiple locations.

**Business Skills** – Training will be offered to all occupations. Trainees will receive supplemental skills in areas that include Business Processes, Communication, Customer Support, and Marketing/Sales. Training will allow the workforce to better manage the overall business while implementing new products and processes.

**Computer Skills** – Training will be offered to all occupations to provide knowledge and skills in systems and computer applications.

**Continuous Improvement** – Training will be offered to all occupations. Training will allow employees to achieve high-level efficiency, quality, and customer service. Training will include topics such as 5S/Lean Six Sigma/Design for Six Sigma, Change Management, Coaching/Feedback and Delegation Skills.

**Hazardous Materials** - Training will be offered to Engineers, Technicians and Managers. Courses offered include Hazardous Materials Awareness and Hazardous Materials Handling and Disposal. Training will help to ensure employees are able to prevent hazards and/or address potential hazards exposure.

**Manufacturing Skills** – Training will be offered to all occupations. Training will provide supplemental skills in areas of Engineering Skills, Foreign Corrupt Practices Act, Insider Threat Identification Skills, Product Export Skills, Value Engineering Skills and Work Instruction Skills. Training will allow employees to better manage manufacturing processes while implementing the new products and processes.

## **Computer-Based Training (CBT)**

CBT will be provided to supplement Class/Lab and E-Learning training. Trainees will receive up to 100 hours of CBT in Continuous Improvement, Business Skills and Computer Skills.

## **Commitment to Training**

AeroVironment spends approximately \$700K annually on training including basic skills, harassment prevention, new employee orientation, work place ethics and diversity. ETP funds will not displace the Company's existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

AeroVironment's Continuous Improvement Specialist will oversee the ETP-funded training. Additionally, each location will assign an individual responsible for that location's administrative duties. The Company has also retained a third-party subcontractor to assist with administration.

### **Temporary to Permanent Hiring**

AeroVironment will train 70 workers under Panel guidelines for the Temporary-to-Permanent program (Job Number 1). The Company has retained these employees on a temporary basis, with the intention of hiring them into full-time, permanent positions after training. The average time for "converting" temporary workers into full-time permanent employment is six months. These employees will receive employer-paid share-of-cost for healthcare premiums upon hire into full-time permanent employment with AeroVironment.

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). Trainees cannot be enrolled until after they have been hired by the Company into full-time, permanent employment. Until they are so hired, retention and post-retention wage requirements cannot be satisfied and the Company will not receive progress payments.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **DEVELOPMENT SERVICES**

AeroVironment retained Training Funding Partners in Fountain Valley to assist with development of this proposal for a flat fee of \$21,500.

### **ADMINISTRATIVE SERVICES**

AeroVironment also retained Training Funding Partners to 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/E-Learning Hours**

8-200 Trainees may receive any of the following:

**BUSINESS SKILLS**

- Business Process Skills
- Business/Technical Writing
- Communication Skills
- Contract/Negotiation Skills
- Customer Support
- Finance/Accounting Skills
- Marketing/Sales Skills
- Presentation Skills/Meeting Management
- Train-the-Trainer

**CONTINUOUS IMPROVEMENT**

- 5S/Lean Six Sigma/Design for Six Sigma
- Change Management
- Coaching/Feedback
- Delegation Skills
- Supply/Demand and Sales/Operation Planning
- Goal Setting
- ISO Skills
- Leadership Skills
- Manufacturing Best Practices
- Process Improvement
- Project/Program Management
- Quality Assurance/Quality Control
- Quality System Processes
- Strategic Thinking
- Team Building
- Time Management Skills
- Troubleshooting
- Visual Performance Skills

**HAZARDOUS MATERIALS**

- Hazardous Materials Awareness
- Hazardous Materials Handling and Disposal

**MANUFACTURING SKILLS**

- Electrostatic Discharge Skills
- Engineering Skills
- Foreign Corrupt Practices Act
- Insider Threat Identification Skills
- International Traffic in Arms Regulations
- Product Export Skills

- Proprietary Manufacturing Processes
- Value Engineering Skills
- Work Instruction Skills

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

### **CBT Hours**

0-100

Trainees may receive any of the following:

#### **BUSINESS SKILLS**

- 3 Routes to Good Communication (1 hour)
- 8 Keys to a More Respectful Workplace: In Doubt? Find Out! (1 hour)
- 8 Keys to a More Respectful Workplace: Listen for Understanding (1 hour)
- 8 Keys to a More Respectful Workplace: Recap (1 hour)
- AV ITAR and Export Training (1 hour)
- Business Execution: 01-Execution Strategies (1 hour)
- Business Execution: 02-Inspiring Workplace Excellence (1 hour)
- Business Execution: 03-Turning Ideas Into Actions (1 hour)
- Complaint Handling (1 hour)
- Developing Your Customer Focus (1 hour)
- Effective Listening Training (1 hour)
- Effective Meetings (1 hour)
- Effective Presentation Design (1 hour)
- General Data Protection Regulation (1 hour)
- Generating Great Ideas (1 hour)
- Handling Conflict: An Employee's Guide (1 hour)
- Handling Difficult Customers (1 hour)
- Handling Difficult People (1 hour)
- Handling Difficult People Round 1 - Conflict Management (1 hour)
- Healthy Communication: 01. Types of Communication at Work (1 hour)
- Healthy Communication: 02. How to Communicate Well at Work (1 hour)
- Healthy Communication: 03. How Not to Communicate (1 hour)
- Improving Operations by Enabling Growth (1 hour)
- Individual Listening Skills (1 hour)
- Information Security Training (1 hour)
- Interpersonal Communication (1 hour)
- Keys to a More Respectful Workplace Introduction (1 hour)
- Nonverbal Communication: Aligning Nonverbal Communication with Intentions (1 hour)
- Over the Rainbow Customer Service Training (1 hour)
- Persuasion & Negotiation Training (1 hour)
- Respect: How to be Respected (1 hour)
- Respect: Working with Dislike (1 hour)
- Service Matters: Advice for New Team Members (1 hour)
- Service Matters: Building Rapport (1 hour)
- Service Matters: Demonstrating You Care (1 hour)
- Service Matters: Excellent Customer Service Natural or Learned? (1 hour)
- Service Matters: Handling Bad Days (1 hour)

- Service Matters: Handling Varied Customer Styles (1 hour)
- Service Matters: Introduction (1 hour)
- Service Matters: Is the Customer Always Right? (1 hour)
- Service Matters: Motivation to Excel (1 hour)
- Service Matters: Taking Ownership (1 hour)
- Service Matters: What's in it for You? (1 hour)
- Service Matters: Who Would Replace You? (1 hour)
- The Art of Execution (1 hour)
- The Art of Influence (1 hour)
- The Importance of Good Communication Skills (1 hour)
- The Power of One- Taking Accountability to Get Results (1 hour)

### **COMPUTER SKILLS**

- Intermediate Microsoft Word 2016 Training (1 hour)
- Advanced Microsoft Outlook 2016 (1 hour)
- Autotime Training (1 hour)
- Creating an Online Spreadsheet (1 hour)
- Cyber Security Basics (1 hour)
- Excel 2016 - Frequently Used Formulas and Functions (1 hour)
- Excel 2016 - Pivot Tables (1 hour)
- Excel 2016 - Statistical Analysis (1 hour)
- Excel 2016 PC (1 hour)
- Excel Online Training (1 hour)
- Handling Sensitive Information Securely (1 hour)
- Mobile Device Security (1 hour)
- Outlook 16 Training (1 hour)
- PowerPoint 2016 - Adding Media (1 hour)
- PowerPoint 2016 - Present & Share (1 hour)
- PowerPoint 2016 - Shapes & SmartArt (1 hour)
- PowerPoint 2016 - Working with Pictures (1 hour)
- PowerPoint 2016 (Mac) (1 hour)
- PowerPoint 2016 (PC) (1 hour)
- Understanding Cyber Security (1 hour)
- USB Attack (1 hour)
- Word 2016 - Mail Merge (1 hour)
- Word 2016 - Table of Contents and References (1 hour)
- Word 2016 - Tables and Graphics (1 hour)
- Word 2016 - Tracking Changes & Comments (1 hour)
- Word 2016 (Mac) (1 hour)
- Word 2016 (PC) (1 hour)
- Word 2016 Newsletter (1 hour)

### **CONTINUOUS IMPROVEMENT**

- Accelerate Goal Achievement (1 hour)
- Acting Effectively on a Team (1 hour)
- Becoming a Great Leader: Building an Effective Leadership Team (1 hour)
- Becoming a Great Leader: Characteristics (1 hour)

- Becoming a Great Leader: Creating Followership (1 hour)
- Becoming a Great Leader: Developing Followers (1 hour)
- Becoming a Great Leader: Developing Yourself (1 hour)
- Becoming a Great Leader: Effective Delegation (1 hour)
- Becoming a Great Leader: Empowering Followers (1 hour)
- Becoming a Great Leader: Fundamentals (1 hour)
- Becoming a Great Leader: How to be a Follow-able Leader (1 hour)
- Becoming a Great Leader: How to Motivate Employees (1 hour)
- Becoming a Great Leader: Introduction (1 hour)
- Becoming a Great Leader: Leadership and Power (1 hour)
- Becoming a Great Leader: Motivational Leadership (1 hour)
- Becoming a Great Leader: Putting It All Together (1 hour)
- Building Accountability: Managing Yourself (1 hour)
- Building Accountability: Taking Ownership (1 hour)
- Building Accountability: Trust and Performance at Work (1 hour)
- Coaching Skills: Captain (1 hour)
- Coaching Skills: Contributor (1 hour)
- Coaching Skills: Introduction (1 hour)
- Coaching Skills: Key Player (1 hour)
- Coaching Skills: Rookie (1 hour)
- Coaching Skills: The Coaching Conversation (1 hour)
- Coping with Change: Change Behaviors (1 hour)
- Coping with Change: Change for Managers (1 hour)
- Coping with Change: Change Model (1 hour)
- Coping with Change: Change Phases (1 hour)
- Coping with Changes in Your Team (1 hour)
- Creating the Mindset for Your New Role (1 hour)
- Critical Thinking (1 hour)
- Critical Thinking and Problem Solving (1 hour)
- Decision Making (1 hour)
- Discussing Your New Leadership Role (1 hour)
- Effective Decision Making (1 hour)
- Emotional Intelligence - Perceiving Emotions (1 hour)
- Emotional Intelligence (1 hour)
- Emotional Intelligence Essentials (1 hour)
- Emotional Intelligence Fundamentals (1 hour)
- Emotional Intelligence: What is Emotional Intelligence? (1 hour)
- Establishing Yourself as a Leader (1 hour)
- Get Smarter With Goals (1 hour)
- Goal Setting (1 hour)
- Goal-Setting in the Workplace (1 hour)
- Handling Change (1 hour)
- Helping Others Achieve Goals (1 hour)
- How Do I Build an Effective Leadership Team (1 hour)
- Kaizen: The Philosophy of Continuous Improvement (1 hour)
- Leadership in Times of Change (1 hour)
- Making an Impact (1 hour)
- Making Change Happen (1 hour)
- Making Decisions (1 hour)
- Making Your New Management Position Successful Part A (1 hour)

- Making Your New Management Position Successful Part B (1 hour)
- Managing Difficult People (1 hour)
- Master Lean Thinking to Boost Value and Results (1 hour)
- Project Teams Rely on Each Other (1 hour)
- Reducing Resistance to Change (1 hour)
- Reinforce Great Teamwork (1 hour)
- S.M.A.R.T. Goals (1 hour)
- Share Your Knowledge and Expertise (1 hour)
- Situational Leadership (1 hour)
- Stepping up to Leadership (1 hour)
- Successful Time Management (1 hour)
- Team Building: 01. What is Team Building? (1 hour)
- Team Building: 02. Types of Teams (1 hour)
- Team Building: 03. Effective Team Members (1 hour)
- Team Building: 04. Team Development and the Tuckman Model (1 hour)
- Team Building: 05. Characteristics of a Successful Team (1 hour)
- Team Building: 06. Teams in Crisis Situations (1 hour)
- Team Norms and Expectations (1 hour)
- Teamwork in Critical Situations (1 hour)
- Teamworking (1 hour)
- The Art of Negotiation (1 hour)
- The Fundamentals of Ownership Thinking (1 hour)
- Transformational Leadership: Creating Focus During Change (1 hour)
- Transformational Leadership: Dealing with Resistance (1 hour)
- Transformational Leadership: Transforming the Organization (1 hour)
- Understand the Expectations of a New Role (1 hour)
- What It Takes to Be a Leader (1 hour)

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





**Training Proposal for:  
Beachbody, LLC**

**Agreement Number: ET19-0265**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** M. Paccarelli

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Mfg & Food Processing (E) Multimedia/Entertainment (51+) Services (61, 71, 72, 81, 92)  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: 628	U.S.:651	Worldwide: 658
<u>Turnover Rate:</u>	16%		
<u>Managers/Supervisors:</u> (% of total trainees)	20%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$312,000		\$0	\$0		\$312,000

In-Kind Contribution:	100% of Total ETP Funding Required	\$776,640
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills; Computer Skills; Continuous Impr	500	8-200	0-100	\$624	\$17.54
				Weighted Avg: 24			

**Minimum Wage by County:** \$17.54 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

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

**Wage Range by Occupation**

Occupation Titles	Wage Range	Estimated # of Trainees
Administrative Staff		43
Research & Development Staff		28
Call Center Staff		60
Technology/ Tech Quality Assurance Staff		96
Marketing & Sales Staff		100
Finance & Accounting Staff		29
Supply Chain Planning Staff		37
Strategic Planning & Business Analysts		7
Manager/Supervisor		100

**INTRODUCTION**

Founded in 1998, Beachbody, LLC (Beachbody) ([www.beachbody.com](http://www.beachbody.com)) is a provider of fitness, nutrition, and weight loss programs. The Company has four main product lines: digital streaming fitness programs, digital nutrition programs, nutritional products and fitness DVDs. The Company's comprehensive approach of combining fitness, nutrition, and online community support to help people transform their lives has empowered over 23 million customers to date.

Beachbody creates and markets fitness and weight loss programs with brand names such as 80 Day Obsession®, 21 Day Fix®, Insanity®, P90X®, Insanity®, Focus T25®, PiYo®, Body Beast® and Hip Hop Abs®. These programs combine challenging workouts with easy-to-follow diet guidelines and nutritional supplements, including its health shake called Shakeology®.

Headquartered in Santa Monica, Beachbody has locations in Utah, New York, and two other California locations in Westlake Village and El Segundo. The proposed training will be provided to employees in Beachbody's locations in Santa Monica, Westlake Village and El Segundo.

## **PROJECT DETAILS**

This will be Beachbody's second ETP Agreement. In the first ETP Agreement, Beachbody was highly focused on a massive Information Technology (IT) system enhancement that allowed the Company to shift content delivery.

Over the last year, Beachbody has increased the scope of development for both nutritional and fitness product initiatives, resulting in the release of Beach Bars, Daily Sunshine, new Shakeology flavors (including vegan options), and 2B Mindset. More products are in the pipeline that will require training support. On top of its health and nutritional solutions, Beachbody's goal is to deliver an unparalleled customer service and peer-support system which is expanded through its TeamBeachbody.com, a dynamic online support and fitness community website.

Additionally, the implementation and complete overhaul of IT systems have allowed Beachbody to scale content delivery, streamline the purchase of nutritional products, and continue to prepare Beachbody for international expansion while maintaining a high level of service. Beachbody will continue to invest in interactive technology releases based on the latest technology overhaul, most recently requiring upgrades in Oracle, ByDesign, and OnDemand. The maintenance and continuous improvement of these systems will require a highly skilled workforce, which will be the focus of this new proposal.

### **Training Plan**

Courses will be delivered using Class/Lab and Computer-Based Training. Although some course titles may be similar to those in the previous Agreement, courses will not be duplicated. Topics are updated and upgraded versions.

**Business Skills** – Training will be offered to all occupations, covering a wide range of sales/marketing tools, customer solutions, content development, network/traffic quality, data science and analytics, supply chain management, and other strategic skills. Particular emphasis will be placed on skills needed to support the execution of strategic initiatives. Training will also help trainees learn about the Company's new and enhanced product and service offerings and allow the business to make data driven decisions.

**Computer Skills** – Training will be offered to all occupations in advanced and intermediate computer software training, including Oracle, database systems, data analysis software, and Microsoft Office. Trainees will receive relevant computer skills in a quickly evolving landscape to support the Company's strategic move toward digital streaming.

**Continuous Improvement** - Training will be provided to all occupations and will focus on internal business systems and functionality. Training will help the Company create a more efficient business environment, improve quality and delivery times, and reduce waste. Additional emphasis will be placed on process improvement, project management, and effective implementation and execution skills.

### **Commitment to Training**

ETP funds will not displace the Company's existing financial commitment to training. Beachbody provides continuous employee development with an annual budget of approximately \$1.8M and covers new-hire orientation, sexual harassment prevention, OSHA-mandated training, on-the-job training, leadership development, supply chain certification, job competency specific training, security training, General Data Protection Regulation (GDPR) compliance, and mentoring programs. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

Beachbody has a team of 10 employees who will be dedicated to training and administration of this project. A Learning Management Administrator will be the point of contact for this program and will be supported by an Organizational Development Specialist and an Organizational Development Coordinator. Beachbody's Vice President of Organization Development will supervise the team and oversee all aspects of the ETP contract. Training will also be provided by other in-house staff who are subject-matter experts.

### Learning Management System

Beachbody uses Cornerstone Learning Management System to manage all training hours for employees. The system meets all ETP requirements and has been approved by staff to be used for ETP recordkeeping.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0351	Santa Monica, El Segundo, Westlake Village	02/01/16 – 01/31/18	\$243,450	\$216,126 (89%)

### **DEVELOPMENT SERVICES**

N/A

### **ADMINISTRATIVE SERVICES**

N/A

### **TRAINING VENDORS**

N/A

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

8-200

Trainees may receive any of the following:

**CONTINUOUS IMPROVEMENT**

- ✚ Six Sigma
- ✚ Lean
- ✚ Frontline Leadership
- ✚ Team Building
- ✚ Decision Making
- ✚ Equipment Operations
- ✚ Process Improvement
- ✚ Collaboration Skills
- ✚ Implementation Skills
- ✚ Improving Productivity
- ✚ Effective Planning
- ✚ Leadership Skills
- ✚ Decision Making
- ✚ Motivation
- ✚ Team Building
- ✚ Coaching
- ✚ Effective Delegation
- ✚ Effective Feedback
- ✚ Avoiding Management Traps
- ✚ Effective Planning

**COMPUTER SKILLS**

- ✚ Microsoft Office (Advanced & Intermediate)
- ✚ Oracle Reimplementation
- ✚ By Design System Process
- ✚ Citrix
- ✚ Computer Programming
- ✚ Film Production and Editing
- ✚ Website Design
- ✚ Java Code
- ✚ Network Administration
- ✚ AVID Editing
- ✚ SCCM Design and Integration
- ✚ Service Layer Integration in Various Computer Languages
- ✚ API Integration
- ✚ Code Base Integration
- ✚ Database Code Integration
- ✚ Test Case Development

**BUSINESS SKILLS**

- ✚ Presentation Skills
- ✚ Communication Skills
- ✚ Conflict Management
- ✚ Business Writing
- ✚ Project Management
- ✚ Negotiating Skills

- ✚ Interpersonal Skills
- ✚ Dealing with Change
- ✚ Problem Solving
- ✚ Product Knowledge
- ✚ Strategic Planning
- ✚ Effective Meetings
- ✚ Public Speaking Skills
- ✚ Listening Skills
- ✚ Documentation Skills
- ✚ Managing Client Data
- ✚ Effective Feedback

### **CBT Hours**

0 – 100

### **COMPUTER SKILLS**

- ✚ Excel 2016 Essential Training (8 hours 52 minutes)
- ✚ Excel 2013 Essential Training (6 hours 31 minutes)
- ✚ Excel 2016: Pivot Tables in Depth (3 hours 42 minutes)
- ✚ Excel 2013: Charts in Depth (3 hours 46 minutes)
- ✚ Excel: Advanced Formulas and Functions (5 hours 26 minutes)
- ✚ Office 365: Learning Excel (1 hour)
- ✚ Google Analytics Essential Training (3 hours)
- ✚ SEO Foundations (3 hours 27 minutes)
- ✚ Visio 2016 Essential Training (6 hours 15 minutes)
- ✚ WordPress Essential Training (5 hours 57 minutes)
- ✚ React.js Essential Training (3 hours 37 minutes)
- ✚ SQL Essential Training (3 hours 27 minutes)
- ✚ SQL: Data Reporting and Analysis (2 hours 16 minutes)
- ✚ Learning SQL Programming (1 hour 28 minutes)
- ✚ Premiere Pro CC Essential Training (2014) (8 hours)
- ✚ Developing for the MEAN Stack and MongoDB (3 hours)
- ✚ Agile Project Management (1 hour 15 minutes)
- ✚ InDesign CC Essential Training (2013) (9 hours 30 minutes)
- ✚ Excel 2013 Tips and Tricks (4 hours 30 minutes)
- ✚ Managing Your Time (15 minutes)
- ✚ JavaScript Essential Training (5 hours 30 minutes)
- ✚ Amazon Web Services Essential Training (5 hours)
- ✚ JavaScript Functions (1 hour 30 minutes)
- ✚ JavaScript and AJAX (1 hour 15 minutes)
- ✚ Programming Foundations: Fundamentals (4 hours 45 minutes)
- ✚ Programming Foundations: Object-Oriented Design (3 hours)
- ✚ Programming Foundations: Real World Examples (3 hours 9 minutes)
- ✚ Up and Running with AngularJS (1 hour 15 minutes)
- ✚ Up and Running with Excel 2010 (4 hours)
- ✚ Analyzing Big Data with Hive (1 hour 53 minutes)
- ✚ JavaScript and JSON (1 hour 15 minutes)
- ✚ Tableau 10 Essential Training (4 hours 41 minutes)

### **BUSINESS SKILLS**

- ✚ Accounting Fundamentals (2 hours 45 minutes)
- ✚ Business Writing Principles (1 hour 30 minutes)
- ✚ Grammar Foundation (2 hours 15 minutes)

- ✚ Writing Email (1 hour 15 minutes)
- ✚ Communication Tips (3 hours 30 minutes)
- ✚ Communication Foundations (1 hour 30 minutes)
- ✚ Communicating with Confidence (1 hour 30 minutes)
- ✚ Customer Service Foundations (2 hours)
- ✚ Customer Service Leadership (1 hour 13 minutes)
- ✚ Managing Meetings (1 hour 39 minutes)
- ✚ Managing To-Do Lists (50 minutes)
- ✚ Marketing Tips (7 hours 30 minutes)
- ✚ Online Marketing Foundations (2014) (5 hours 15 minutes)
- ✚ Public Speaking Fundamentals (1 hour)

### **CONTINUOUS IMPROVEMENT**

- ✚ Project Management Fundamentals (3 hours 20 minutes)
- ✚ Time Management Fundamentals (2 hours 51 minutes)
- ✚ Time Management Tips (4 hours 36 minutes)
- ✚ Leadership Foundation (1 hour 30 minutes)
- ✚ Leading Yourself (1 hour)
- ✚ Leading with Emotional Intelligence (1 hour 46 minutes)
- ✚ Body Language for Leaders (1 hour)
- ✚ New Manager Fundamentals (1 hour 15 minutes)
- ✚ Big Data Foundations: Techniques and Concepts (2 hours 15 minutes)
- ✚ Influencing Others (1 hour 15 minutes)
- ✚ Getting Things Done (1 hour 30 Minutes)
- ✚ Creative Quick Tips (6 hours 30 minutes)
- ✚ Decision-Making Fundamentals (45 minutes)
- ✚ Learning to be Assertive (1 hour)
- ✚ Improving Your Conflict Competence (1 hour)

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



**RETRAINEE - JOB CREATION**

**Training Proposal for:**

**Performance Food Group, Inc.**

**Agreement Number: ET19-0264**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** L. Vuong

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative	Industry Sector(s):	Wholesale Trade Goods Movement Services Transportation/Logistics  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Teamsters Local 630		
Number of Employees in:	CA: 1,000	U.S.: 15,000	Worldwide: 15,000
<u>Turnover Rate:</u>	16%		
<u>Managers/Supervisors:</u> (% of total trainees)	11%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$217,100		\$0	\$0		\$217,100

<b>In-Kind Contribution:</b>	<b>100% of Total ETP Funding Required</b>	<b>\$384,601</b>
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Comm'l. Skills, Computer Skills, Cont. Imp., HazMat, OSHA 10/30	270	8-200	0	\$650	\$17.54
				Weighted Avg: 25			
2	Retrainee Priority Rate Job Creation	Business Skills, Comm'l. Skills, Computer Skills, Cont. Imp., HazMat, OSHA 10/30	32	8-200	0	\$1,300	*\$14.62
				Weighted Avg: 50			

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

**Minimum Wage by County:** Job Number 1: \$17.54 per hour for Los Angeles County.  
 Job Number 2 (Job Creation): \$14.62 per hour for Los Angeles County.

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

**Used to meet the Post-Retention Wage?:**  Yes  No  Maybe  
 Up to \$2.50 per hour may be used to meet the Post-Retention Wage for Job Numbers 1 and 2.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Driver		95
Warehouse Staff		79
Inventory Staff		6
Sales Staff		43
Purchasing Staff		7
Administrative Staff		12
HR Staff		3
Quality Control Staff		1
Manager		24
<b>Job Number 2 (Job Creation)</b>		
Administrative Staff		2
Driver		17

Warehouse Staff		3
Sales Manager		10

## **INTRODUCTION**

Founded in 1987 and located in the City of Industry, Performance Food Group, Inc. (PFG) ([www.performancefoodservice.com](http://www.performancefoodservice.com)) is an assembly food service distribution operation specializing in Italian and Italian-American food products, equipment, food related products and non-food items. The Company carries and distributes its own signature brand as well as competing brands of products such as baked goods, USDA meats, poultry, condiments, cleaning supplies, serving items, trays and paper goods. The Company delivers more than 125,000 products to 85,000 customer locations on a daily basis. Major customers include Subway, Butterball, Campbell's, Coca Cola, General Mills, Kellogg's and Kraft Foods.

Headquartered in Richmond, Virginia, the Company has two facilities in California, one in Livermore and one in the City of Industry. In this proposal, PFG requests ETP funding to train 270 full-time employees and 35 full-time newly-hired employees (Job Creation) at the City of Industry location, where all training will take place.

The Company has several challenges driving the need for training: adding new procurement, buying and operating systems, finding qualified and skillful commercial truck drivers, and new scanner and voice selector technologies. To maintain strong sales, promote growth, meet customer demand, drive internal improvement and continuing its in-house Certified Commercial Driver's License program, PFG has implemented two initiatives: The Performance Way and Performance 6, tools and programs to improve processes and procedures across all departments.

### **Veterans Program**

The Company is working to attract Veterans into its workforce through Job Fairs and other forms of outreach. However, the Company is not requesting Veterans in this proposal.

### **Union Support**

ETP has received letter of support from Teamsters Local Union 630 for Driver and Warehouse Staff.

### **Retrainee - Job Creation**

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

In the past year, PFG has experienced a 6% growth in business volume and anticipates additional growth of 10% in the coming year. Company also invested \$250K in new technology, scanner and operating systems. Therefore, the Company has committed to hiring 32 new employees at its City of Industry facility over the next two years (Job Number 2). These new employees will support business growth and the Company's investment in new systems and technologies. PFG will train these employees to operate sophisticated technology systems, equipment and computer programs, and business operations.

## **PROJECT DETAILS**

As the Company grows and technology advances, employees need new and upgraded skills training. PFG's goal is to focus on learning activities that produce well-informed team members that are more knowledgeable, engaged and passionate about the business. The overall objective of training is to promote staff development to drive profitable sales and growth.

This will be PFG's second ETP Agreement, and the second in five years. Previous training focused on basic operating equipment, vehicles, technology and job related skills to keep up with industry requirements. This proposal will focus on new technologies, more complex operation systems and employees' development to increase performance and retention. As such, the Company has developed a company-wide training program to modernize business practices and procedures. Workers will gain skills sets and experience needed to optimize job performance, promote growth, better serve customers and improve efficiencies throughout the facility. Training from prior ETP project will not be duplicated.

### **Training Plan**

Training will be provided via Classroom/Laboratory and Videoconference in the following:

**Business Skills:** Training will be offered to all occupations and focus on customer service, financial strategy, business planning, team building and decision making.

**Commercial Skills:** Training will be offered to Managers, Drivers, Warehouse, Inventory, Purchasing and Quality Control Staff. Training will include equipment operation, warehousing procedures and focus on the Commercial Driver License (CDL) driver. Knowledge and skills obtained will prepare trainees to take CDL examination by the Department of Motor Vehicle.

**Computer Skills:** Training will be offered to all occupations in various software applications, systems and in the skills necessary to support the business operations. Training will learn to effectively use the Company's automated systems to provide efficient and effective customer service.

**Continuous Improvement:** Training will be offered to all occupations and will ensure trainees have the skills to improve processes and maximize efficiency to better serve customers and increase profit margins.

**Hazardous Materials:** Training will be offered to Managers, Drivers, Warehouse, Inventory, Purchasing and Quality Control Staff. Training will include proper techniques, knowledge and communication on handling chemicals, frozen foods as well as food handling and hazardous materials.

### **Certified Safety Training**

**OSHA 10/30:** OSHA 10 training will be provided to Drivers, Warehouse, Inventory, Purchasing and Quality Control Staff. OSHA 30 training will be provided to Managers to ensure a safe work environment.

1. OSHA 10/30. This training is a series of courses "bundled" by industry sector and occupation. It consists of 10 hours of classroom or CBT training for journey-level workers and 30 hours for frontline supervisors. The coursework is geared to construction work, and manufacturing. Completion of the training results in a certificate that expands

employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

### **Commitment to Training**

PFG's annual California training budget of approximately \$500,000 and includes mandatory safety training, sexual harassment prevention, standards of conduct and abusive conduct. Most training is delivery via class/lab and on-the-job training.

ETP funds will support PFG's ongoing financial commitment to training. After the completion of the ETP program, the Company will continue to focus on developing and upgrading employee abilities and ensuring that employees possess the skills sets needed to be successful and career oriented. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

#### ➤ Training Infrastructure

Training will begin upon Panel approval. PFG has designated a team of six staff that includes VP of Human Resources and Operations, HR Manager, Controller and Trainer to oversee ETP training and administrative responsibilities. The Company has also retained a third party administrator for enrollment, data tracking and invoicing. (See Administrative Services below)

### **Impact/Outcome**

Approximately 20 Warehouse Staff and Drivers will be trained and become CDL drivers after the completion of training in Commercial Skills – CDL training.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0461	City of Industry	06/27/16 – 06/26/18	\$298,840	\$217,954 (73%)

Although PFG only achieved 73% of its expected earning, 250 trainees completed training and retention for a total of 11,521 eligible hours.

According to the Company, it was unable to utilize 100% of ETP funding due to two key staffers who left the Company. As a result, training was not documented; and therefore, not included. To ensure the success of this proposal, the Company has taken corrective action and designated a team of six staff that includes VP of Human Resources and Operations, HR Manager, Controller and Trainer to oversee ETP training and administrative responsibilities. In addition, the Company has a designated coordinator at each department to manage and collect all training data and report to two HR Managers. Going forward, staff has coordinated and communicated with trainers and trainees to ensure all training is properly documented on a timely manner. This proposal has been rightsized to more closely match prior performance.

## **DEVELOPMENT SERVICES**

Judith's Training Services (JTS) in Los Angeles assisted with development for a flat fee of \$17,200.

## **ADMINISTRATIVE SERVICES**

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

## **TRAINING VENDORS**

To Be Determined

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

8-200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Business Performance
- Payroll
- Marketing
- Business Planning
- Business Administration
- Merchandising
- Financial Strategy
- Inventory Control
- Product Knowledge
- Strategic Planning
- Evaluations
- Monitoring
- Business Report Writing and Editing
- Negotiating
- Conflict Management
- Interpersonal Skills
- Identifying Customer Needs
- Customer Needs
- Product Knowledge
- Decision Making
- Motivation
- Team Building
- Administration
- Coaching Procedures
- Leadership

**COMMERCIAL SKILLS**

- Fork Lift
- Commercial Drivers' License
- Equipment Operation & Repair
- Warehousing
- Manufacturing Practices
- Cross Training in Production Equipment
- Scanner

**COMPUTER SKILLS**

- Software – Applications and Equipment
- Microsoft Office (Intermediate & Advance)
- Publisher – Newsletter, Customer Collateral
- Visio – Charting Design
- Sales Force Application
- Scanner Software

- Manufacturing Resource Planning MRP/ERP/SAP/Oracle
- Accounting Systems
- Computerized Scheduling
- Sales Forecasting
- Inventory Control
- Purchase Order Tracking
- Engineering/Document Control
- Payroll
- General Accounting

#### **CONTINUOUS IMPROVEMENT**

- Problem Solving
- Scanner Process and Procedure
- The Performance Way
- Performance 6
- Team Building
- Quality Concepts
- Total Quality Management
- Just-In Time Process
- Production Operations/workflow
- Process Improvement
- Decision Making
- Leadership Skills for Frontline Workers
- Assembly Procedures
- Inventory Control
- Strategic Planning, Evaluations, Monitoring
- Train-The-Trainer
- Voice Selector Technology

#### **HAZARDOUS MATERIALS**

- Dry Goods
- Refrigerated Foods
- Frozen Foods
- Chemical

#### **OSHA 10/30** (Certified OSHA Instructor)

- OSHA 10
- OSHA 30

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

**Lou Villalvazo**  
Secretary-Treasurer



**Frank Afoa**  
President

June 11, 2018

To Whom it may concern,

My name is Alfredo Salazar, Divisional Representative of Teamsters Local 630. I am the assigned representative for the members of PFG, Performance Food Group of Southern California. The union supports the goals of the ETP program.

If you have any questions, please do not hesitate to contact my office.

Respectfully,

Alfredo Salazar  
Divisional Representative  
Teamsters Local 630

cc: Lou Villalvazo  
Secretary-Treasurer  
Teamsters Local 630

cc: Frank Afoa  
President  
Teamsters Local 630





**Training Proposal for:**

**Vitas Healthcare Corporation of California**

**Agreement Number: ET19-0255**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** E. Wadzinski

**PROJECT PROFILE**

Contract Attributes:	SET Medical Skills Training Priority Rate HUA	Industry Sector(s):	Services (G) Healthcare (62)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles, Orange, San Diego, Ventura, Santa Clara, San Joaquin, Sacramento, Santa Clara, San Mateo, Riverside, Contra Costa	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 1,813	U.S.:8,890	Worldwide: 8,890
Turnover Rate:	12%		
Managers/Supervisors: (% of total trainees)	0%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$899,080		\$0	\$0		\$899,080

In-Kind Contribution:	100% of Total ETP Funding Required	\$1,219,504
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET Medical Skills Training Priority Rate	MS Didactic, MS Preceptor, Computer Skills Continuous Impr	910	8-200	0	\$988	\$22.77
				Weighted Avg: 38			

**Minimum Wage by County:** Job Number 1: \$22.77 per hour Statewide SET Priority Industry Average Hourly Wage;  
**Health Benefits:**  Yes  No This is employer share of cost for healthcare premiums – medical, dental, vision.  
**Used to meet the Post-Retention Wage?:**  Yes  No  Maybe  
 \$2.50 per hour may be used to meet the Post-Retention Wage for Job 1 trainees.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Registered Nurse (RN)		414
Licensed Vocation Nurse (LVN)		351
Home Health Aide		41
Social Worker		53
Chaplain		51

**INTRODUCTION**

Founded in 1978, Vitas Healthcare Corporation of California (Vitas) ([www.vitas.com](http://www.vitas.com)), is a provider of hospice services to both adult and pediatric patients. Vitas focuses on non-curative hospice care for the terminally-ill and offers two levels of services: hospice care and palliative care. Hospice Care is a collaborative approach in providing comfort to patients and their families as well as preserving dignity while offering options and choices that go far beyond accepted medical standards. Palliative Care is a complement to the patient’s medical treatment, by way of managing pain and alleviating symptoms to improve quality of life and providing emotional and spiritual support in dealing with difficult medical issues. The Company’s patients have a wide range of life-limiting illnesses including: cancer; stroke; heart, lung, liver and kidney diseases; Multiple Sclerosis; Amyotrophic Lateral Sclerosis; Alzheimer’s; and Acquired Immune Deficiency Syndrome. Vitas works closely with patients, families, and attending physicians and partners with hospitals, nursing homes and community-based organizations.

The Company, is a wholly owned subsidiary of Chemed. Training will take place at 13 Vitas facilities located in: Encino, Camarillo, Covina, Irvine, Lancaster, Lathrop, Milpitas, Walnut Creek, Riverside, San Diego, San Mateo, Sacramento and Torrance. This will be the Company’s fourth ETP Agreement.

## **PROJECT DETAILS**

In the previous Agreement Vitas focused on training to overhaul the Company's proprietary bedside documentation system, Care Plan It (CPI). In this proposal, training will focus on tools and equipment, medical skills and proprietary software applications.

Vitas has instituted initiatives in response to the hospice care trends and changes which will require supplemental training to prepare social workers, chaplains and hospice aides to provide the best care possible. Training initiatives include training to prepare staff for the voluntary Hospice Certification, as well as ongoing training in teamwork, enhanced job skills, and best practices for those who have not received training. Additionally, staff will receive training on new software programs. Due to the nature of hospice and palliative care, it is imperative that both medical and non-medical staff receive training to provide patients and their families with support and services available.

Some courses in this curriculum are similar to courses in the previous Agreement. However, the material or content has been updated due to changes in regulations, interpretation of regulations, process changes, and system changes. Trainees will not receive duplicate training.

### **Training Plan**

The proposed training plan targets Medical Skills (Didactic and Clinical Preceptor), Computer Skills and Continuous Improvement training. The Company has in-house trainers ready to provide training in their areas of expertise.

**Computer Skills:** Training will be offered to all trainees on proprietary software applications for various functions that include charting, patient records management and scheduling. Training will also include an overview of the new Vitas Suite Application, MyVitas training, OnDemand Cognos Reporting, Personal Navigator and PeopleSoft Human Resources. These courses will support Vitas' goal of increasing efficiencies and improving patient care.

**Continuous Improvement:** Training will be offered to all trainees to expand their knowledge in different areas of expertise; develop better skills in dealing with and understanding patient needs; work effectively in teams; and communicate well with patients and their families to be successful in the hospice industry. Training will also include Vitas business processes, best practices, and admissions skills to provide knowledge to Admissions RN staff on the growing services offered to patients and their families.

**Medical Skills Training – Clinical Preceptor:** Training will be offered to Registered Nurses and Licensed Vocational Nurses. Trainees will observe hands-on skills under a formalized mentoring program pairing an experienced team member with other nurses. Training will include Clinical Assessment, Competency Training, Medication Delivery, Plan of Care Development and Plan of Care Implementation. Preceptor training will also support Didactic skills training.

**Medical Skills Training – Didactic:** This training will be offered to Registered Nurses and Licensed Vocational Nurses. Training will include updates in patient care skills including Long Term Care, Pain Management Documentation Skills, Wound Care, Medical Equipment Training and Pharmacy/Medication Training. Training will also include skills on patient evaluation, planning and intervention in situations that arise during the patient care process.

### **Special Employment Training/Wage Modification**

Under SET, the participating employer is not required to demonstrate out-of-state competition. To qualify under SET, trainees in non-priority industries must be earning at least the statewide

average hourly wage of \$30.36 at the end of retention. Trainees employed in a priority industry qualify for a SET wage modification up to 25% below the statewide average hourly wage to \$22.77 per hour.

### **High Unemployment Area**

Approximately 96 trainees in Job Number 1 work in Los Angeles and San Joaquin Counties, High Unemployment Areas (HUA) with unemployment exceeding the state average by at least 25%. The Company is not requesting a wage modification.

### **Commitment to Training**

The Company's training budget is an estimated \$4M per year and includes harassment prevention, emergency preparedness, new-hire orientation, diversity and basic skills training. ETP funds will not displace the Company's existing financial commitment to training. Safety training is provided in accordance with all pertinent requirements under state and federal law.

#### ➤ Training Infrastructure

Training and administration will be overseen by the Vice President of Workforce Development & Training and the Vice President Chief Nursing Officer; in conjunction with at least one Patient Care Administrator at each Vitas location. Vitas has trainers in place to provide training upon approval. The Company has also developed internal administrative processes and procedures to help document and track training per ETP guidelines.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned	
				\$	%
ET16-0176	Various	10/25/2015– 10/24/2017	\$713,712	\$713,712 (100%)	
ET12-0335	Various	04/02/2012- 04/01/2014	\$418,824	\$418,824 (100%)	

### **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:

**MEDICAL SKILLS – CLINICAL PRECEPTOR**

- Patient Assessment & Care
- Geriatric Nursing Skills
- Medical/Surgical Nursing Skills
- Pre and Post Operative Care
- Orthopedic Nursing Skills
- Oncology Nursing Skills
- Hospice Nursing Skills

**MEDICAL SKILLS TRAINING – DIDACTIC**

- Behavioral Health Nursing Skills
- Body Mechanics
- Care of Bariatric Patient
- Care of the Cardiac Patient
- Care of the Stroke Patient
- Care Planning and Documentation
- Central Lines Management
- Chest Tube Care & Management
- Diabetes Care & Management
- Educating the Patient & Family
- Equipment Skills (IV pumps, cardiac telemetry, vital signs, pulse-oximeter, ventilators, specialty beds and mattresses, etc.)
- Evidence Based Practices
- Gastrointestinal Assessment and Management
- Infection Control
- Medical/Surgical Nursing Skills
- Medication Administration & Management
- Moderate Sedation
- New Graduate Nursing Skills
- Nurse Orientation Training (for New Grads only)
- Nursing Diagnosis Skills
- Nursing Process Skills
- Oncology Nursing Skills
- Orthopedic Nursing Skills
- Ostomy & Continence Care
- Pain Management (Acute & Chronic)
- Patient Assessment & Care
- Patient Fall Prevention
- Psychiatric Nursing Skills
- Psychotropic Medications
- Renal Assessment & Management
- Respiratory Assessment & Care
- Restraints
- Total Parenteral Nutrition (TPN)

- Transfer Techniques
- Triage Nursing Skills
- Ventilator and Tracheotomy Care
- Wound & Skin Care

### **COMPUTER SKILLS**

- Vitas Suite
- Electronic Medical Recordkeeping
- Proprietary e-Applications
- On-Demand Cognos Reporting

### **CONTINUOUS IMPROVEMENT**

- Admissions Processes
- Best Practices
- Business Processes
- Care Planning and Documentation
- Case Management/Discharge Planning
- Charge Nurse Training/Frontline Leadership Skills
- Communications Skills
- Conflict Resolution Skills
- CORE Measures
- Crisis Prevention Intervention (CPI)
- Critical Thinking Skills
- Culturally Appropriate Care
- Customer Service Skills
- Documentation Skills
- Organization and Time Management Skills
- Patient and Family Centered Care Skills
- Performance and Quality Improvement and Procedures Skills
- Team Building Skills
- Utilization Review

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



**Training Proposal for:**  
**WWF Operating Company, LLC dba Whitewave**  
**Foods Company**

**Agreement Number: ET19-0174**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** L. Vuong

**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 checked="" type="checkbox"/> Yes <input type="checkbox"/> No Teamsters Local Union 630		
Number of Employees in:	CA: 1,574	U.S.: 5,000	Worldwide: 10,000
<u>Turnover Rate:</u>	5%		
<u>Managers/Supervisors:</u> (% of total trainees)	10%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$332,800		\$0	\$0		\$332,800

In-Kind Contribution:	100% of Total ETP Funding Required	\$531,584
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Cont. Imp., HazMat, Mfg. Skills	320	8-200	0	\$1,040	\$17.54
				Weighted Avg: 40			

**Minimum Wage by County:** \$17.54 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

**Wage Range by Occupation**

Occupation Titles	Wage Range	Estimated # of Trainees
Machine Operator		175
Maintenance Mechanic		38
Palletizer		8
Quality Assurance Technician		14
Warehouse Worker		24
Administrative Staff		27
Manager		12
Supervisor		22

**INTRODUCTION**

Founded in 1996, and headquartered in Broomfield, Colorado, WWF Operating Company, LLC dba Whitewave Foods Company (WWF) ([www.whitewave.com](http://www.whitewave.com)), manufactures, markets, distributes and sells branded plant-based (almond, soy bean, coconut and cashew) foods and beverages, coffee creamers, frozen desserts, premium dairy and organic products. The Company has manufacturing facilities located in Texas, Virginia, New Jersey, Florida, Utah, New York, Oregon, Europe and one facility in California, City of Industry, where all training will take place.

WWF produces natural and organic beverages, which include Horizon®, the leading national organic dairy brand; and Silk®, the national category leader in natural and organic plant-based beverages including Silk®, Soymilk Silk®, PureAlmond, Cashew Silk®, and Silk® PureCoconut. WWF also makes International Delight®, Earthbound Farms® organic produce, Vega One®, So-Delicious® frozen desserts, Wallaby Yogurt® and Land O'Lakes® liquid dairy products. Customers include retail and drug stores, super markets and wholesale food distributors.



## **Veterans Program**

The Company is working to attract veterans into its workforce through job fairs and other forms of outreach. However, this project does not include training for Veterans.

## **Union Support**

ETP has received letter of support from Teamsters Local Union 630 for Machine Operator, Maintenance Mechanic, Palletizer, Quality Assurance Technician and Warehouse Worker.

## **PROJECT DETAILS**

This is WWF's fourth ETP proposal, and the fourth in the last five years. Previous training focused on new products, manufacturing practices and equipment procedures. This proposal will provide training related to new business functions and operations, expanding internal software training and continuing manufacturing practices to keep pace with changes in industry requirements and customer expectations. In addition, WWF is currently experiencing major growth on several fronts: re-structuring its five business units to better serve customers and improve internal business processes; setting up an in-house trainer program; and adding and upgrading new maintenance software systems. The Company is also investing approximately \$160,000 building an innovative learning center in City of Industry with new computers, equipment and motors.

To support these changes, WWF must provide training on various business needs, services and products to incorporate new technologies, processes and practices quickly and efficiently. Workers will gain new skill sets needed for optimal job performance. Workers will also enhance necessary manufacturing skills required to meet customer demands, provide quality products and services and become more efficient. Training from prior ETP projects will not be duplicated.

## **Training Plan**

Training will be provided via Classroom/Laboratory and Videoconference in the following:

**Business Skills:** Training will be offered to all occupations in communication, planning, time management, productivity, decision making and problem solving. Training will provide workers the necessary skills to perform their jobs more effectively and efficiently.

**Computer Skills:** Training will be offered to all occupations to effectively utilize the Company's new and existing automations systems and to support projects and manage overall business operations.

**Continuous Improvement:** Training will be offered to all occupations and focus on team building skills, business culture development, process improvement and developing training skills.

**Hazardous Material:** Training will be offered to all occupations in proper techniques and knowledge for handling chemical, water and waste cleaning as well as the environmental impact of hazardous materials.

**Manufacturing Skills:** Training will be offered to Machine Operators, Maintenance Mechanics, Palletizers, Quality Assurance Technicians and Warehouse Workers. Training will provide upgraded job skills with a focus on good manufacturing practices, equipment operations and overall production operations to meet growing customer demand.

## **Commitment to Training**

WWF annual California training budget is approximately \$650,000. Training includes mandatory safety training, machine operating, process improvement, quality assurance, leadership and basic computer skills. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

#### ➤ Training Infrastructure

Training is scheduled to begin upon Panel approval and will be delivered on-site by in-house experts and vendors as needed. One Learning and Development Manager and two Learning and Development Coordinators will oversee ETP training and all administrative responsibilities.

### **Green/Clean Operations**

WWF is committed to company growth, while also implementing Green/Clean processes. The Company provides consumers with healthy choices and uses less water and fewer greenhouse gases to produce products. Several of the Company's brands have partnered to support consumer efforts to properly recycle their packaging.

As a packaged goods company, WWF adjusts portion control packaging in an effort to eliminate millions of pounds of waste. The Company has improved from a 30% to a 38% reduction in greenhouse gas emissions by improving manufacturing and packaging practices and having more efficient transportation.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned	
				\$	%
ET16-0281	City of Industry	12/14/15 – 12/13/17	\$430,720	\$333,591	(78%)
ET13-0422	City of Industry	6/30/13 – 6/29/15	\$543,348	\$401,289	(74%)
ET12-0402	City of Industry	5/25/12 – 5/24/14	\$117,720	\$117,720	(100%)

### **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**

- Planning
- Productivity
- Communication Skills
- Time Management
- Decision Making
- Leadership Skills Training
- Supervisor Training

**COMPUTER SKILLS**

- System Application & Product
- Microsoft Office
- Microsoft Excel (Intermediate & advanced)
- Microsoft PowerPoint
- SAP Training

**CONTINUOUS IMPROVEMENT**

- Making System Process Improvements
- Team Building Skills
- Problem Solving Skills
- Train-the-Trainer

**HAZARDOUS MATERIALS**

- Chemical Training
- Waste, Water Environmental Training
- Sustainability Training

**MANUFACTURING SKILLS**

- Integrated Work Systems Training
- Lead Operator Training
- Quality Assurance Training
- Maintenance Training
- Component Training
- Forklift Operator Training
- EH1 Line Operations Training
- EH2 Line Operations Training
- EH3 Line Operations Training
- EQ5 Line Operations Training
- Bag and Box Line Operations Training
- Milk Receiving Training
- Processing Operations Training
- Blend/Mix Room Operations Training
- Extraction Operations Training
- Sidel Line Operations Training
- Logistics/Receiving Training

- Prisma Line Operations Training
- Filler Operations Training
- Bosch Operations Training
- Warehouse Operations Training
- Palletizer Operations Training
- Program Logistics Planning Training
- Sanitation Training
- Waste Training

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

**Lou Villalvazo**  
Secretary-Treasurer



**Frank Afoa**  
President

December 18, 2017

Lisa Robles  
Danone Wave Foods  
18275 Arenth Ave  
City of Industry, CA 91748

**Re: ETP Training Panel**

Ms. Robles,

We understand that the members represented by Teamsters Local Union 630 at Danone Wave Foods located in the City of Industry will be receiving training through ETP and support equal opportunity training. The Union is always in favor of our members gaining experience and knowledge through training and education. Teamsters Local Union 630 would like to express their appreciation for the opportunity presented to our members at Danone Wave Foods.

Respectfully,

Alex Flores  
Business Representative  
Teamsters Local Union 630

Cc: Lou Villalvazo, Secretary-Treasurer  
Frank Afoa, President

**Food, Industrial and Beverage Warehouse, Drivers and Clerical Employees Union - Los Angeles and Vicinity**  
750 S. Stanford Avenue / Los Angeles, California 90021-1416  
(213) 627-2178 / Fax (213) 627-0846



**Training Proposal for:**

**Castro Valley Health, Inc. dba CVH Home Health Services**

**Agreement Number: ET19-0251**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** San Francisco Bay Area

**Analyst:** C. Hoover

**PROJECT PROFILE**

Contract Attributes:	Retrainee SET Job Creation Initiative Veterans Medical Skills Training Priority Rate	Industry Sector(s):	Services (G) Healthcare (62)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Mateo, Contra Costa, Santa Clara, Sacramento, Los Angeles	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 267	U.S.:267	Worldwide: 267
<u>Turnover Rate:</u>	10%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$468,000		\$0	\$0		\$468,000

In-Kind Contribution:	100% of Total ETP Funding Required	\$1,010,700
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET Priority Rate Medical Skills Training	Continuous Impr, Computer Skills, MS Didactic, MS Clinical with Preceptor	200	8-200	0	\$1,560	\$22.77
				Weighted Avg: 60			
2	Job Creation Initiative Medical Skills Training	Continuous Impr, Computer Skills, MS Didactic, MS Clinical with Preceptor	80	8-200	0	\$1,560	*\$14.00
				Weighted Avg: 60			
3	Veterans Job Creation Initiative Medical Skills Training	Continuous Impr, Computer Skills, MS Didactic, MS Clinical with Preceptor	20	8-200	0	\$1,560	*\$14.00
				Weighted Avg: 60			

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

<p><b>Minimum Wage by County:</b> <u>Job Number 1:</u> \$22.77 per hour- Modified Statewide Average Wage (SET); <u>Job Numbers 2 &amp; 3:</u> \$14.00 per hour for Sacramento County, \$14.62 per hour for Los Angeles County and \$15.18 per hour for San Mateo, Contra Costa and Santa Clara counties.</p> <p><b>Health Benefits:</b> <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No This is employer share of cost for healthcare premiums – medical, dental, vision.</p> <p><b>Used to meet the Post-Retention Wage?:</b> <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Maybe</p> <p>Up to \$2.50 per hour may be used to meet the Post-Retention Wage.</p>
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Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Administrative Support Staff		56
Licensed Vocational Nurse		18
Therapist Assistant		59
Registered Nurse		62
Medical Social Worker		5
<b>Job Number 2 (Job Creation)</b>		
Certified Home Health Aide		14
Licensed Vocational Nurse		14
Therapist Assistant		29
Registered Nurse		23



<b>Job Number 3 (Job Creation / Veterans)</b>		
Licensed Vocational Nurse		3
Therapist Assistant		6
Registered Nurse		6
Medical Social Worker		5

## **INTRODUCTION**

Founded in 2005 and headquartered in San Ramon, Castro Valley Health, Inc. dba CVH Home Health Services (CVH) ([www.cvhcare.com](http://www.cvhcare.com)), with its affiliates - Parinas General Corporation dba CVHCare and CVHCare Holdings, Inc., offers a comprehensive, patient-centered post-acute home health care program. Its services are designed to support a patient's transition from an in-patient acute-care hospital to a long-term, acute-care hospital or skilled-nursing facility (SNF). ETP-funded training will be delivered at CVH's locations in Rancho Cordova, Burlingame, San Jose, Burbank and San Ramon in addition to clinical training in the field.

### **Veterans Program**

The Panel has established a higher reimbursement rate and other incentives for training California veterans. As part of CVH's job-creation component of this project, it has committed to hiring 20 veterans out of the 100 new employees to be hired as part of its effort to fulfill their KP contract.

CVH has developed an outreach program through its Chief of Staff, a retired Captain of the US Navy. The Chief of Staff has led recruitment for the US Navy and currently works with the Transition Assistance Program (TAP) offices of all branches of the military (Air Force, Army, Coast Guard, Marines, and Navy). This experience will aid CVH's pursuit of hiring veterans during expansion.

## **PROJECT DETAILS**

Training is necessary to expand CVH's ability to service patients statewide, driven by a new contract with Kaiser Permanente (KP) to treat KP patients in a home-health setting statewide and Medicare changes. The KP contract requires the Company to double its clinical personnel over the next six months, an additional 200 clinicians in both Northern and Southern California. Also, Medicare recently approved home-care reimbursement for chronically ill patients. This has increased home-care visits by over 36% in the last two years.

Additionally, CVH will be delivering a National Patient Safety Goal initiative to safely reduce the number of hospital readmissions (within 30 days) during a patient's treatment because hospital readmissions have potentially negative impacts on the physical, mental and emotional well-being of individuals. The high number of readmissions has been identified by policymakers as a key opportunity to reduce health-care costs and improve quality of care.

### **Retrainee - Job Creation**

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

Due to expanding existing business capacity as a result of CVH's KP contract, it has committed to hiring 100 new employees- Job Numbers 2 & 3 (Veterans). The date-of-hire for trainees will

be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into “net new jobs” as a condition of contract. The Rancho Cordova and San Jose facilities are already set to begin CVH’s expansion operations.

## Training Plan

CVH will provide the following training via Class/Lab and E-Learning:

**Computer Skills:** Training will be offered to all occupations on Microsoft Office (Intermediate & Advanced) and navigating Electronic Medical Records Software. Trainees will receive instruction on assessing and processing data within CVH’s OASIS system.

**Continuous Improvement:** Training will be offered to all occupations in order to foster improvement in multiple skills such as culturally appropriate care, medical records, documentation, customer service, standard operating procedures, communication skills, interdisciplinary-team skills and quality improvement.

**Medical Skills (Didactic) Training:** Training will be offered to all occupations in order to better understand advanced clinical process, ensure competency, and maximize patient satisfaction and safety. Courses include Clinical-Skills Lab, Patient-Transfer Techniques, Wound Management, Patient-Fall Prevention, End-of-Life Care, Cardiac Conditions and Hospice Skills. Trainees will also receive case-management skills.

**Medical Skills (Clinical Preceptor) Training:** Training will be offered to RNs, LVNs, Therapist Assistants and Medical Social Workers to demonstrate efficiencies of advanced-clinical processes learned in the classroom. Courses include Intravenous (IV) Therapy, Enteral Feeding Tube Management, Rehabilitation Skills, Diabetic Management and Equipment Skills. Medical Social Workers will receive Patient Assessment and Care, Case Management, Dementia Care and Infection Control courses. Training is typically provided at a 1:1 trainer-to-trainee ratio; however, the ratio must not exceed 1:10.

## Commitment to Training

CVH annually spends \$475,000 on training. ETP funds will not displace the Company’s existing financial commitment to training. Job-specific and company-wide training includes sexual harassment prevention, Emergency Medical Responder (EMR), on-boarding, safety, annual compliance, and skills’ competency training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

### ➤ Training Infrastructure

The Chief Human Resource Officer (CHRO) will be the project’s dedicated administrator and has past experiences with ETP at other companies. The CHRO will have the resources of CVH’s Human Resources Department (HRD), including three Personnel Staff to assist with administration. Additionally, each facility’s Director of Nursing and Director of Rehabilitation will work with the CHRO to assist and oversee local administration. CVH also retained a third-party administrator, National Training Systems, Inc. (NTS), to assist with administration. Training will be delivered by in-house subject-matter experts.

## Special Employment Training

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

**RECOMMENDATION**

Staff recommends approval of this proposal.

**DEVELOPMENT SERVICES**

CVH retained National Training Services, Inc. (NTS) in Ladera Ranch to assist with development of this proposal for a flat fee of \$24,950.

**ADMINISTRATIVE SERVICES**

CVH also retained NTS to perform administrative services in connection with this proposal for a fee not to exceed 10% of payment earned.

**TRAINING VENDORS**

N/A

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

8-200

Trainees may receive any of the following:

**CONTINUOUS IMPROVEMENT**

- Communication Skills
- Coordination of Care
- Customer Service
- Compliance & Patient Privacy
- Coordination of Care
- Documentation Skills
- Environmental Safety
- Interdisciplinary Team Process
- National Patient Safety Goals
- Outcome Based Quality Improvement
- Preceptor Skills
- Problem Solving
- Team Building
- Quality Assessment and Performance Improvement

**COMPUTER SKILLS**

- Clinical Services System Management
- Electronic Medical Records Application Skills
- ICD-10 Coding
  - OASIS
- MS Office Suite Skills (Intermediate & Advanced)
  - Word
  - Excel
  - PowerPoint

**MEDICAL SKILLS TRAINING – DIDACTIC**

- Advanced Cardiac Life Support (ACLS)
- Activities of Daily Living
- Advanced Directives
- Annual Skills Update
- Arterial Blood Gas (ABG) Interpretation
- Assessing Cardiac Changes
- Assessing Respiratory Function
- Basic-Life Support (BLS)
- Behavior Management
- Body Mechanics
- Cardiac Conditions
- Care of the PleurX Patient (Drainage System)
- Case Management
- Central Venous Access Devices
- Clinical-Skills Lab
- Death and Dying
- Dementia Care
- Depression
- Diabetic Management
- Disease Management

- Disaster & Emergency Preparedness
- Discharge Planning
- Electrolyte Imbalance
- Elder Abuse
- Enteral Feeding Tube Management
- End-of-Life Care
- Equipment Skills
- Functional Mobility Assessment
- Gastrointestinal Assessment & Management
- Grief and Bereavement
- Handling of Death in a Home
- Hazardous Materials
- Home Healthcare
- Hospice Skills
- Incontinence Management (Colostomy Care, Urinary Catheter)
- Infection Control
- Intravenous (IV) Therapy
- Infusion Therapy
- Influenza Vaccination
- Joint Replacement Care and Outcomes
- Medication Administration & Management
- Medical Social Worker Skills
- Multiple Sclerosis
- Neurological Assessment/ Conditions
- Occupational Therapy Skills
- Orthopedic Conditions
- Pain Management (Acute & Chronic)
- Palliative Care
- Parkinson Care
- Patient Assessment & Care
- Patient-Fall Prevention
- Patient-Transfer Techniques
- Patient Safety
- Physical Therapy Skills
- Preventing Abuse
- Pressure Ulcers
- Point-of-Care Laboratory Testing
- Psychological and Spiritual Issues Related to Death and Dying
- Rehabilitation Skills
- Respiratory Care
- Skin Assessment
- Speech Therapy Skills
- Supplies, Medical Gasses and Drugs
- Symptom Management Stoplight Tools
- Tracheotomy Care
- Urinary Management (Foley Catheter, Input / Output)
- Wound Management
- Wound VAC Therapy (Vacuum-Assisted Closure)

### **MEDICAL SKILLS TRAINING – CLINICAL W/ PRECEPTOR**

- **Rehabilitative Services**
  - Patient Assessment & Care
  - Case Management

- Clinical-Skills Lab
- Dementia Care
- Diabetic Management
- Enteral Feeding Tube Management
- Equipment Skills
- Infection Control
- Intravenous (IV) Therapy
- Medication Administration & Management
- Rehabilitation Skills
  
- **Therapy Services**
  - Body Mechanics
  - Functional Mobility & Ambulation
  - Infection Control
  - Neurological Conditions
  - New Therapist Skills
  - Occupational Therapy Skills
  - Orthopedic Conditions
  - Patient Assessment & Care
  - Physical Therapy Skills
  - Rehabilitation Skills
  - Speech Therapy Skills

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



**Training Proposal for:  
Genentech USA, Inc.**

**Agreement Number: ET19-0232**

**Panel Meeting of:** September 28, 2018

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

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Biotechnology/Life Sciences Manufacturing  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Mateo, Solano, and San Diego Counties	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: 14,686	U.S.: 25,000	Worldwide: 93,000
<u>Turnover Rate:</u>	2%		
<u>Managers/Supervisors:</u> (% of total trainees)	16%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$650,000		\$0	\$0		\$650,000

In-Kind Contribution:	100% of Total ETP Funding Required	\$1,429,500
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement	625	8-200	0	\$1,040	\$16.70
				Weighted Avg: 40			

**Minimum Wage by County:** \$18.22 per hour for San Mateo County; \$17.03 per hour for San Diego County; and \$16.70 for Solano 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
Operations/Production Staff		325
Corporate Support Staff		100
Research and Development/Data Analytics Staff		100
Supervisor/Manager/Director		100

**INTRODUCTION**

Founded in 1976 and based in South San Francisco, Genentech USA, Inc. (Genentech) (Company) ([www.gene.com](http://www.gene.com)) develops, manufactures, and commercializes medicines to treat patients with serious or life-threatening medical conditions. Genentech is a company with a global market and a significant development pipeline. A few product examples include Herceptin® to treat breast cancer, TAMIFLU® to treat influenza, and Boniva® to treat osteoporosis. Genentech provides its products to medical professionals and patients worldwide.

Genentech's goal is to use genetic engineering and advanced technologies to manufacture medicines that address unmet medical needs. Genentech also invests in its workforce to enhance productivity, maintain low turnover rate, and recruit top notch employees.

The Company's focus on capital investment in research, equipment and facilities, and in training, is matched by its dedication to patients. Genentech works to ensure comprehensive access to its medicines through innovative distribution strategies such as the Genentech Access to Care Foundation (GATCF). This Foundation helps deliver the Company's medicines to eligible patients who do not have insurance, who are underinsured, or whose health care plan will not pay for their medicine. The Company reports that it has helped over 1.5 million patients access its medicines over the last 20 years.



Genentech is headquartered in South San Francisco with additional facilities in Vacaville, Oceanside, and Dixon. This will train 625 employees from all four locations who work for the Commercial and US Medical Affairs unit. This unit includes the clinical research, product safety, data management/biostatistics, medical information and product experience departments.

The Company's Commercial and US Medical Affairs Unit plays a crucial role in introducing new treatment options to patients and delivering Genentech's medicines to those in need. Commercial operations takes a data-driven approach to managing a medicine's life cycle, focusing on marketing, and selling novel treatments for various diseases. Employees in this group educate healthcare providers, patients, and other stakeholders about the science behind the medicine.

Genentech's last ETP funded project was 12 years ago which focused on manufacturing skills training on the production floor for frontline production workers. Genentech continues to provide such training throughout its operations, although this project focuses on the Commercial and US Medical Affairs unit.

### **Veterans Program**

Genentech estimates that 65 Veterans are among the targeted trainee population. This number is a conservative estimate since veterans status is self-reported by the employee, and the number could be higher. While Genentech participates in Veteran specific recruiting efforts, the Company is not requesting a Veterans job number. Genentech will account for Veteran trainees by reporting demographic information during enrollment of trainees.

### **Need for Training**

Workers in research, data analytics, sales and customer service are the main focus of this training to ensure they have critical knowledge of new markets, products, systems and processes. Examples of the changes affecting the need for worker retraining include:

#### **Increased Need to Innovate**

Genentech is an innovator of new therapies to heal the human condition. Its products serve as a springboard for the Biosimilar market. A biosimilar is a biopharmaceutical drug designed to have active properties, similar to one that has previously been licensed, commonly known as "generics". As Genentech's medicines convert to the generic or biosimilar market, Genentech must continue to research, develop, and manufacture new, groundbreaking medicines to continue its growth. Genentech seeks to develop new and improved biologics to combat cancer, autoimmune diseases, and other diseases with high unmet needs.

#### **New Products**

Currently, the Genentech Research and Early Development pipeline has more than 20 new molecular entities in clinical development. Genentech recently announced that the U.S. Food and Drug Administration (FDA) has approved Perjeta® (pertuzumab), in combination with Herceptin® (trastuzumab) and chemotherapy (the Perjeta-based regimen), for post-surgical treatment of HER2-positive early breast cancer (EBC) in patients with a high risk of breast cancer recurrence.

Genentech also recently announced that the FDA has approved Venclexta® in combination with Rituxan® for the treatment of patients with chronic lymphocytic leukemia (CLL) or small lymphocytic lymphoma (SLL). Venclexta is being developed by AbbVie and Genentech and is jointly commercialized by the two companies in the United States.

## **Process and System Improvements**

Genentech recently implemented a company-wide project to transform its culture with principles of simplicity, flexibility, accountability and speed. A critical component of this transformation is technology, which offers employees more sophisticated, user-friendly options with easy system access. These changes require the trainees more quickly adapt to changes in Genentech's products and to draw on practices and principles, like agile project management methodology, to improve internal processes.

Genentech plans to improve customer service and provide its workforce a more dynamic environment where it utilizes new, improved processes on a consistent basis. The Company is reevaluating its customer contact points by collecting, analyzing, and acting on data collected from customers. This training will assist the targeted employees provide consistently high levels of customer service to its patients, partners, and the global biotechnology market.

## **PROJECT DETAILS**

All training will be provided at company locations in California on company time. Instructors will primarily be internal trainers with expertise in Genentech's products, systems and processes. All trainees will be frontline staff including managers, supervisors, and directors. The directors to be included are not policy makers and provide management oversight of their team/group in addition to conducting frontline duties.

### **Training Plan**

Training will be delivered via instructor-led Class/Lab and E-Learning in the following Types of Training:

**Business Skills:** Trainees across all occupations will receive business skills in areas such as Audit Skills, Business Acumen, Finance/Accounting, and Marketing/Sales Skills. This training will improve the ability of the workforce to better manage the overall business while implementing the new products and processes described above.

**Commercial Skills:** Genentech will deliver supplemental commercial skills to trainees across occupations including: Biosecurity Skills, Change Control, Chromatography Skills, Clinical Development/Trials, and New/Updated Processes/Systems/Products. Genentech's Commercial Skills training will enable frontline workers to better perform their specific job responsibilities. Training will focus on researching, developing, and distributing medications using engineering and design directives that meet the strict standards of the life science industry.

**Computer Skills:** All occupations will receive training on systems and computer applications including Cybersecurity Skills, Salesforce System Skills, and SAP Systems. Such training will enable employees to more effectively utilize systems that are applicable to their job role and responsibilities.

**Continuous Improvement:** Training will be provided to all occupations, and include an overview of Genentech's skills and proficiency necessary for high-level efficiency, quality, and customer service. Training will include topics such as Change Management, Leadership Skills, Product Quality Planning and Process Improvement/Efficiency.

### **Electronic Recordkeeping**

Genentech will use a Learning Management System (LMS) to document all ETP training. The LMS system has been reviewed and approved by ETP.

## **Commitment to Training**

ETP funds will not displace Genentech's existing financial commitment to training. The Company currently spends \$5,000,000 annually in California alone on classroom/laboratory, structured OJT, E-Learning and CBT training. Courses include new employee orientation, basic OSHA training, basic Microsoft Office, workplace ethics, and anti-harassment training. Additionally, the Company supports the cost of employees attending key industry conferences that provide training break-out sessions and seminars on industry topics and trends. This training will continue to be provided at Genentech's expense.

Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

### ➤ Training Infrastructure

Genentech's internal training department will have primary responsibility for ETP administration. The Manager of Learning Management and Administration will be responsible for overall management of the project and will work directly with Training Funding Partners, a third Party Administrator, for ETP project administration. Genentech's Training and Development department is comprised of 130 individuals who directly and indirectly support training needs, delivery and administration across the Commercial, Medical Affairs, and Government Affairs organizations. Specific numbers within Genentech's internal training department are:

- LMS Administrators (6)
- Training Coordinators (17)
- Trainers (47)

The internal training department's staff include schedulers, LMS super users and administrators to oversee project administration. Remaining individuals are operations, management, and leadership team members who play a role in training needs assessment, delivery, and administration.

## **RECOMMENDATION**

Staff recommends approval of this proposal.

## **DEVELOPMENT SERVICES**

Genentech retained Training Funding Partners (TFP) in Fountain Valley to assist with development of this proposal for a flat fee of \$32,500.

## **ADMINISTRATIVE SERVICES**

TFP 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/E-Learning Hours**

8-200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Audit/Documentation Skills
- Business Acumen
- Business Process Skills
- Communication Skills
- Finance/Accounting Skills
- New and Revised SOP (Standard Operating Procedures)
- Product Commercialization Skills
- Product Lifecycle/Product Training
- Reporting/Documentation Skills
- Risk Assessment/Risk Management
- Train-the-Trainer
- Understanding Patent Law

**COMMERCIAL SKILLS**

- Advanced Safety Skills
- Biosecurity Skills
- Change Control
- Chromatography Skills
- Clinical Development/Trials
- Equipment Skills
- Good Documentation Practices
- Inspection Skills
- Laboratory Skills
- Maintenance/Mechanic Skills
- Media Prep/Media Fill
- New/Updated Processes/Systems/Products
- Quality Assurance/Quality Control
- Research and Development Skills
- Work Process Skills

**COMPUTER SKILLS**

- Cybersecurity Skills
- Data Analytics/Database Systems
- Intermediate/Advanced Microsoft Office
- Lab Systems
- Salesforce System
- SAP System

**CONTINUOUS IMPROVEMENT**

- Change Management
- Decision Making
- Leadership Skills
- Operational Excellence

- Problem Solving Skills
- Process Improvement/Efficiency
- Product Quality Planning/ Product Liability
- Project/Program Management
- Team Building
- Time Management
- Troubleshooting/Root Cause Analysis

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



**Training Proposal for:  
Intuitive Surgical, Inc.**

**Agreement Number: ET19-0235**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** San Francisco Bay Area

**Analyst:** C. Hoover

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Manufacturing Healthcare Technology/Other  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Santa Clara	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 2,333	U.S.: 3,445	Worldwide: 4,844
<u>Turnover Rate:</u>	2%		
<u>Managers/Supervisors:</u> (% of total trainees)	8%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$670,800		\$0	\$0		\$670,800

<b>In-Kind Contribution:</b>	<b>100% of Total ETP Funding Required</b>	<b>\$1,092,630</b>
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Cont. Imp., Mfg. Skills, Computer Skills, PL-Mfg. Skills	600	8-200	0-100	\$1,118	\$18.22
				Weighted Avg: 43			

**Minimum Wage by County:** \$18.22 per hour for Santa Clara County.

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

**Used to meet the Post-Retention Wage?:**  Yes  No  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
Information Technology Staff		30
Engineering/Quality/Research and Development Staff		160
Manufacturing/Logistics Staff		45
Marketing/Sales Staff		150
Operations Support Staff		100
Technician/Service Staff		65
Supervisors/Managers		50

**INTRODUCTION**

Founded in 1995 and headquartered in Sunnyvale, Intuitive Surgical, Inc. (ISI) ([www.intuitivesurgical.com](http://www.intuitivesurgical.com)), with its affiliate, Intuitive Surgical Operations, Inc. (ISOI) manufactures surgical robots used across cardiac, urology, gynecologic, colorectal, pediatric and general surgical disciplines. ISI is the parent company that primarily focuses on sales/marketing, and its subsidiary, ISOI primarily focuses on manufacturing. ISI has locations in Georgia, Mississippi, Virginia, Connecticut, North Carolina, Mexico, Switzerland, Germany, Korea, India and Japan. ETP-funded training will be delivered to ISI and ISOI employees that work at its Sunnyvale headquarters.

ISI has four generations of *da Vinci*® Surgical System: the Xi, Si, S and standard, used in general laparoscopic surgery. Hospitals worldwide use the *da Vinci*® system to perform minimally invasive surgery, which reduces incidence of complications, post-operative recovery time and length of hospital stay. ISI is advancing this system's new platforms - imaging, advanced instruments, *da Vinci*® SP and its diagnostic platform.

This is ISI's fourth ETP Agreement, and the fourth in five years. Previous training focused on continuous improvements, introduction/features of new products, technician-focused training and new products. This training will focus on emerging technologies, engineering design, and development of new products/technologies such as ISI's next-generation robotics, 3D vision, SureForm 60™ stapler and SmartFire™ technology, and its newly FDA approved *da Vinci*® SP for urologic procedures. Some of the training courses listed in the proposed curriculum are repeated. However, coursework under the prior Agreement will not be duplicated.

## **Veterans Program**

In this proposal, 18 Veteran trainees will receive ETP-funded training. In ISI's prior Agreement, it delivered 1,956 hours of training to veterans which included six Veteran (Job Creation) Retrainees. While ISI hires veterans and participates in veteran-specific recruiting efforts, the Company is not requesting a Veteran Job Number. ISI will account for veteran trainees by reporting demographic information during enrollment of trainees.

## **PROJECT DETAILS**

Due to demand in Europe and Asia, ETP funding will allow ISI to efficiently design, develop, launch, sell and service its new and updated products. Training will help ISI expand into these new markets and better compete in the industry of advanced medical equipment manufacturing.

## **Training Plan**

The following training will be delivered via Class/Lab, Productive Lab (PL), E-Learning and Computer-Based Training (CBT):

**Business Skills:** Training will be offered to all occupations in Business Process Skills, Customer Service/Support Skills, New/Upgraded Product Skills and Time Management Skills. Training will increase the ability to perform job functions efficiently within ISI's dynamic and advanced manufacturing environment

**Computer Skills:** Training will be offered to all occupations in Agile Software Skills, Change Order System Skills, Computer-Aided Engineering and Design Tools, ISI Proprietary System Skills and Microsoft Office (Intermediate/Advanced).

**Manufacturing Skills:** Training will be offered to Engineering/Quality/Research and Development, Manufacturing/Logistics and Technician Staff. Topics include Change Order Process Skills, Clinical Product Skills, Failure Mode Effects Analysis and New/Updated Manufacturing Processes/Systems/Products.

**Continuous Improvement:** Training will be offered to all occupations. Training will improve efficiencies and productivity by implementing improved processes to the Company's unique operations' model. Training will include topics such as Business Development Skills, Leadership/Coaching, Strategic Thinking, Team Building, Troubleshooting and Six Sigma Skills.

## **Productive Laboratory**

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

ISI has identified approximately 250 staff for PL training in the following occupations: Engineering/Quality/Research & Development Staff, Manufacturing/Logistics Staff and Technician/Service Staff. All PL will be in Manufacturing Skills (New/Updated Manufacturing Process/Systems/Products, Production and Equipment Operations and Maintenance, and Technician Product Certification).



Trainees will receive approximately 60 hours of PL. ISI anticipates only 10-15% of its workforce will need more than 40 hours of PL training. The majority of PL is done on a 1:1 ratio basis, however, ISI requests a 1:2 trainer-to-trainee ratio. There are certain circumstances when a trainer is going over a specific process on the robotic equipment and technology and may need to provide training in a 1:2 ratio environment to bring the staff up to speed quickly to enable them to perform their particular job function. ISI expects less than 5% of the PL will be done with a 1:2 trainer-to-trainee ratio.

### **Computer-Based Training**

While in-house instructors will deliver the majority of training via Class/Lab and PL, ISI will deliver some training topics via CBT.

### **Temporary to Permanent Hiring**

ISI will train 100 workers under Panel guidelines for the Temporary-to-Permanent program. The Company has retained these employees on a temporary basis, with the intention of hiring them into full-time, permanent positions after training. The average time for “converting” temporary workers into full-time permanent employment is three months. It is expected that these workers will receive employer-paid share-of-cost for healthcare premiums while on temporary status, and upon hire into full-time permanent employment.

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

### **Commitment to Training**

The Company’s 2019 California training budget is approximately \$2 million. ISI currently provides new hire orientation, sexual harassment prevention, introductory computer skills, expense report processing, insider trading, business ethics and company code of conduct training. ISI delivers training via class/lab, on-the-job and CBT.

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

#### ➤ Training Infrastructure

The Talent Development Program Manager will oversee all administration. The Senior Training Administrator, Technical Product Education Manager, Safety & Manufacturing Training Manager, Learning & Development Coordinator and the LMS Training Administration Analyst will assist with project management. The Company retained Training Funding Partners (TFP) to assist with administrative duties. Training will be delivered by in-house experts and vendors as needed.

### **Impact/Outcome**

With ETP funding, ISI employees will earn certifications in Project Management Institute and Six Sigma (Black & Green Belt). In addition, the Company has multiple internal certifications.

For example, when a new product is implemented or a change is made to a product, ISI requires a new certification for employees affected by these changes before they are able to perform their job in the manufacturing environment.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **ACTIVE PROJECTS**

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0118	\$477,176	7/11/16 – 7/10/18	415	1,026	647

Based on ETP Systems, 28,551 reimbursable hours have been tracked for potential earnings of \$477,176 (100% of approved amount).

### **PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned	
				\$	%
ET14-0335	Sunnyvale	4/28/14 – 4/27/16	\$367,734	\$367,734	(100%)
ET13-0277	Sunnyvale	1/28/13 – 1/27/15	\$240,496	\$240,496	(100%)

### **DEVELOPMENT SERVICES**

TFP in Fountain Valley assisted with development for a flat fee of \$5,000.

### **ADMINISTRATIVE SERVICES**

TFP will also perform administrative services for a fee not to exceed 12% of payment earned.

### **TRAINING VENDORS**

Spotlight Consulting of San Francisco will provide Continuous Improvement Skills' training for a fee of \$4,500.

The Bulling Town Group of San Leandro will provide Continuous Improvement Skills' training for a fee of \$4,000.

Other trainers will be identified for ETP record-keeping purposes as they are retained.

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

8-200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Business Process Skills
- Communication/Team Building Skills
- Customer Service/Support Skills
- Finance/Accounting Skills
- International Markets/Sales Skills
- Meeting Management
- New/Upgraded Product Skills
- Time Management
- Train-the-Trainer Skills

**CONTINUOUS IMPROVEMENT**

- Business Development Skills
- Change Management Skills
- Leadership/Coaching Skills
- Performance Improvement/Management
- Process Improvement/Re-Engineering Skills
- Project/Program Management Skills
- Quality Assurance/Quality Control
- Statistical Process Control Skills
- Strategic Thinking
- Team Building Skills
- Troubleshooting
- Six Sigma Skills

**COMPUTER SKILLS**

- Agile Software Skills
- Change Order System Skills
- Computer-Aided Engineering and Design Tools
- Microsoft Office (Intermediate/Advanced)
- Intuitive Proprietary Systems Skills

**MANUFACTURING SKILLS**

- Change Order Process Skills
- Clinical Product Skills
- Failure Mode Effects Analysis
- Geometric Dimensioning and Tolerancing
- Good Documentation Practices/Good Manufacturing Practices
- New/Updated Manufacturing Processes/Systems/Products
- Production/Equipment Operations and Maintenance
- Root-Cause Analysis/Corrective Action
- Technician Product Certification

**PL Hours**

0-60

**MANUFACTURING SKILLS** (Ratio 1:2)

- New/Updated Manufacturing Processes/Systems/Products
- Production/Equipment Operations and Maintenance
- Technician Product Certification

**CBT Hours**

0-100

**BUSINESS SKILLS**

- Building Rapport with Your Manager (0.5 hours)
- Building Your Professional Network (0.38 hours)
- Communication 1 - The Science of Communication (0.35 hours)
- Communication 2 - Making an Impact with Non-Verbal Communication (.38hrs)
- Communication 3 - Effective Team Communication (0.52 hours)
- Communication 4 - Do We Have a Failure to Communicate? (0.43 hours)
- Feedback 1 - Polishing Your Feedback Skills (0.56 hours)
- Feedback 2 - Gaining a Positive Perspective on Feedback (0.5 hours)
- Fundamentals of Business Storytelling (0.5 hours)
- Improving Your Memory Skills (0.35 hours)
- Listening 1 - Become a Great Listener (0.4 hours)
- Listening 2 - Listening Even When it's Difficult to Listen (0.43 hours)
- Listening 3 - Using Active Listening in Workplace Situations (0.56 hours)
- Presentation Skills 1 - Planning an Effective Presentation (0.48 hours)
- Presentation Skills 2 - Conquering the Challenges of Public Speaking (.43hrs)
- Si System - Assessment (0.33 hours)
- Si System - Docking (0.33 hours)
- Si System - Draping (0.33 hours)
- Si System - OR Configuration & Power (0.33 hours)
- Si System - Safety Features (0.33 hours)
- Si System - Surgeon Console (0.33 hours)
- Si System - Vision System (0.33 hours)
- Si System Overview (0.33 hours)
- Thoracic Anatomy/Lung Cancer (0.33 hours)
- Upper General Surgery (Foregut) Anatomy (0.33 hours)
- Urogenital Anatomy (0.33 hours)
- Workplace Conflict 1 - The Many Approaches to Facing Workplace Conflict (0.63 hours)
- Workplace Conflict 2 - Handling Team Conflict (0.5 hours)
- Writing Effective E-mails and Instant Messages (0.46 hours)
- Xi System - Assessment (0.33 hours)
- Xi System - Docking (0.33 hours)
- Xi System - Intraoperative Patient Cart Use (0.33 hours)
- Xi System - OR Set-Up & Connections (0.33 hours)
- Xi System - Patient Cart & Draping (0.33 hours)
- Xi System - Surgeon Console (0.33 hours)
- Xi System - Vision System (0.33 hours)
- Xi System Overview (0.33 hours)

**COMPUTER SKILLS**

- MS SharePoint End User 1001 Module 2 (0.5 hours)
- MS SharePoint End User 1001 Module 3 (0.5 hours)
- MS SharePoint End User 1001 Module 4 (0.5 hours)
- MS SharePoint End User 1001 Module 5 (0.5 hours)
- MS SharePoint End User 1001 Module 6 (0.5 hours)
- MS SharePoint End User 1001 Module 7 (0.5 hours)
- MS SharePoint End User 1001 Module 8 (0.5 hours)
- MS SharePoint End User 1001 Module 9 (0.5 hours)
- MS SharePoint End User 1001 Module 10 (0.5 hours)
- MS SharePoint End User 1001 Module 11 (0.5 hours)

**CONTINUOUS IMPROVEMENT**

- Creativity 1 – Unleashing Personal and Team Creativity (0.5 hours)
- Creativity 2 – Verifying and Building on Creative Ideas (0.38 hours)
- Critical Thinking 1 - Confronting Your Assumptions (0.4 hours)
- Critical Thinking 2 - Investigating Arguments (0.45 hours)
- Critical Thinking 3 - Reaching Sound Conclusions (0.35 hours)
- Cultivating Relationships with Your Peers (0.35 hours)
- Decision Making 1 - Getting to the Root of a Problem (0.45 hours)
- Decision Making 2 - Defining Alternative Solutions to a Problem (0.4 hours)
- Decision Making 3 - Choosing and Using the Best Solution (0.4 hours)
- Developing a Personal Accountability Framework (0.4 hours)
- Encouraging Team Communication and Collaboration (0.5 hours)
- Generations 1 - Working on a Cohesive Multigenerational Team (0.42 hours)
- Generations 2 - Managing Multigenerational Employees (0.36 hours)
- Influence 1 - Building Personal Power through Influence (0.5 hours)
- Influence 2 - Influence Others with Political Savvy (0.36 hours)
- Influence 3 - Personal Power and Credibility (0.4 hours)
- Negotiating 1 - The First Steps in Negotiating (0.4 hours)
- Negotiating 2 - Negotiating the Best Solution (0.48 hours)
- Project Management 1- Finding Your Bearings as a Project Manager (0.48 hours)
- Project Management 2- Getting the Big Picture by Defining the Project's Scope and Team (0.5 hours)
- Project Management 3- Managing a Project to Minimize Risk and Maximize Quality (0.48 hours)
- Project Management 4- Mastering the Details of a Project's Schedule and Budget (0.48 hours)
- Project Management 5- Navigating through Changes and Conflicts in Projects (0.446 hours)
- Project Management 6- Taking Final Steps to Bring a Project to its Close (0.45 hours)
- The Building Blocks of Building Trust (0.48 hours)
- Time Management 1 - Make the Time You Need: Get Organized (0.46 hours)
- Time Management 2 - The Art of Staying Focused (0.5 hours)
- Time Management 3 - Maximize Your Productivity by Managing Time and Tasks (0.35 hours)

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



**Training Proposal for:**  
**Sunset Aviation LLC dba Solairus Aviation**  
**Agreement Number: ET19-0269**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** San Francisco Bay Area

**Analyst:** C. Hoover

**PROJECT PROFILE**

Contract Attributes:	Retrainee	Industry Sector(s):	Transportation/Communication Transportation & Warehousing
			Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Counties Served:	Sonoma	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 324	U.S.:521	Worldwide: 521
<u>Turnover Rate:</u>	4%		
<u>Managers/Supervisors:</u> (% of total trainees)	12%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$293,300		\$0	\$0		\$293,300

In-Kind Contribution:	100% of Total ETP Funding Required	\$548,240
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee	Business Skills, Commercial Skills, Advanced Tech	146	8-200	0	\$1,610	\$16.70
				Weighted Avg: 70			
2	Retrainee Veterans	Commercial Skills, Advanced Tech	32	8-200	0	\$1,820	\$16.70
				Weighted Avg: 70			

**Minimum Wage by County:** \$16.70 per hour for Sonoma County (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

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
<b>Job Number 1</b>		
Pilot		96
Cabin Crew		16
Maintenance Technician		16
Customer Service		18
<b>Job Number 2 (Veterans)</b>		
Pilot		24
Cabin Crew		4
Maintenance Technician		4

**INTRODUCTION**

Established in 2009 and headquartered in Petaluma, Sunset Aviation LLC dba Solairus Aviation (Solairus Aviation) ([www.solairus.aero](http://www.solairus.aero)) is a US-based, private-aviation services company that assists aircraft owners with safe, reliable, and efficient management and operation of their aircraft. The Company's services are customized to meet individual travel and financial requirements and support flight operation with a high standard of safety and personalized service, regardless of location of aircraft. ETP-funded training will be delivered at Solairus Aviation's Petaluma headquarters and at out-of-state, flight-simulator school locations.

**Veterans Program**

The Panel has established a higher reimbursement rate and other incentives for training California veterans. Solairus Aviation will include 32 veterans (Job Number 2).



## **PROJECT DETAILS**

Although the basic training needs of flight crew are codified by FAA regulations, there is a supplemental and ongoing need to train on the latest equipment due to constant upgrades occurring in flight avionics technology. Additionally, with the variety of aircraft (Gulfstream 500/650, Embreair- Phenom 500/550, Dassault Falcon Easy, Bombardier Challenger 600 series and many more) that Solairus Aviation serves and with FAA's mandated requirement for continuous training (not included for ETP funding) to ensure flight safety, the Company has to constantly invest in retraining employees. ETP-funded training includes instructor-led Ground School followed by hands-on flight simulator training.

Pilots, Cabin Crew and Maintenance Technicians will receive training on flying into challenging airports, de-icing conditions in bad weather, emergency-response procedures, and inclement-weather flying procedures. The Customer Service occupations will receive training on customer service, customer-relationship management and sales.

### **Training Plan**

ETP-funded training will help Solairus Aviation keep up with the amount of specialized training needed to stay competitive. Training will be delivered via Class/Lab, Advanced Technology (AT) and E-Learning:

**Business Skills:** Training will be offered to Customer Service occupations. Training will include Customer Relationship Management (CRM), Customer Service and Sales Training.

**Commercial Skills:** Training will be offered to Pilot, Cabin Crew and Maintenance Technician occupations. Training will include Flight Operations Procedures, Emergency Response Procedures and International Flying Procedures.

**Advanced Technology (AT):** Training will be offered to Pilot, Cabin Crew and Maintenance Technician occupations. AT training will include Flight Simulator Training, Ground School Training, Instrumentation Training and Avionics Training.

AT training uses Advanced Avionic systems comprising of complex firmware and software to manage flight operations. AT training requires highly educated and trained instructors in the classroom (Ground School) coupled with the use of highly expensive cockpit simulators for hands-on lab exercises. The flight-simulator training typically has a 1:1 trainer-to-trainer ratio, and Ground School is conducted in small cohort sizes of six to eight with a single instructor (meeting the 1:10 AT ratio). These trainers are highly qualified and highly paid. The cost for this training ranges anywhere from \$10,000 to \$24,000 for a forty-hour course.

### **Out-of-State Training**

Solairus Aviation will provide Advanced Technology out-of-state. Training will include flight simulator, instrumentation, avionics, flight-operation procedures and Ground School training. Services are unique to the need of the employer and unavailable in California. (Only a few of the wide variety of aircraft types are available for training in-state.)

### **Commitment to Training**

ETP funds will not displace the Company's existing financial commitment to training. The Company spends approximately \$12.3 million annually on training. Solairus Aviation is committed to the ongoing training and development of employees including orientation, sexual harassment prevention, and operational procedures. The Company also delivers FAA-mandated trainings such as Flight Review and Instrument Proficiency courses. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

➤ **Training Infrastructure**

The Manager of Crew Training from the Training and Operations group will oversee administration assisted by the Training Administrator. The Manager of Crew Training will report directly to the Senior Vice President and the Chief Financial Officer, providing periodical-progress reports on the project. The Company has also hired a subcontractor (Saisoft, Inc.) to assist with administration.

Solairus Aviation is ready to train upon Panel approval. The Company has one full-time and four part-time subject-matter experts who deliver in-house training. Additionally, vendors have been retained and scheduled to provide training.

## **RECOMMENDATION**

Staff recommends approval of this proposal.

## **DEVELOPMENT SERVICES**

Solairus Aviation retained Saisoft, Inc. in Irvine to assist with development of this proposal for a flat fee of \$8,799.

## **ADMINISTRATIVE SERVICES**

Saisoft, Inc. was also retained to perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

## **TRAINING VENDORS**

FlightSafety International of Long Beach has been retained to provide AT training for an estimated fee of \$134,000. FlightSafety will also deliver OST across multiple states (TX, AZ, GA, DE, FL, KS, MO, OH, LA and NJ) depending on the location of the aircraft in which training is to be delivered.

Bombardier of Richardson, TX has been retained to provide OST (AT training) for an estimated fee of \$8,600.

CAE Simuflite of Dallas, TX and of Morristown, NJ has been retained to provide OST (AT training) for an estimated \$32,400.

Other trainers will be identified for ETP record-keeping purposes, as they are retained by Solairus Aviation.

**Exhibit B: Menu Curriculum**

**Class/Lab/E-Learning Hours**

8-200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Customer Service
- Sales Training
- Customer Relationship Management (CRM)
- Business Security Training
- Cybersecurity Awareness Training

**COMMERCIAL SKILLS**

- Flight Operations Procedures
- Flying into Challenging Airports
- De-icing Conditions in Bad Weather
- Emergency Response Procedures (ERP)
- Inclement Weather Flying Procedures
- Safety Management Systems (SMS)
- International Flying Protocols

**AT Hours**

0-200

**ADVANCED TECHNOLOGY** (AT ratio 1:10)

- Ground School Training
- Avionics Training
- Instrumentation Training
- Flight Operations Procedures
- Flight Simulator Training

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



**RETRAINEE - JOB CREATION**

**Training Proposal for:**

**Ajinomoto Foods North America, Inc.**

**Agreement Number: ET19-0252**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** San Diego

**Analyst:** H. Bernard

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative	Industry Sector(s):	Manufacturing  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Bernardino, San Diego Alameda	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 773	U.S.: 2,500	Worldwide: 32,734
<u>Turnover Rate:</u>	14%		
<u>Managers/Supervisors:</u> (% of total trainees)	19%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$398,008		\$0	\$0		\$398,008

In-Kind Contribution:	100% of Total ETP Funding Required	\$488,353
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Cont. Imp., Mgmt. Skills, Mfg. Skills, PL-Mfg. Skills	261	8-200	0-100	\$1,118	\$16.70
				Weighted Avg: 43			
2	Retrainee Priority Rate Job Creation	Business Skills, Cont. Imp., Mgmt. Skills, Mfg. Skills, PL-Mfg. Skills	95	8-200	0-100	\$1,118	*\$13.66
				Weighted Avg: 43			

\*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: \$16.70 per hour in San Bernardino County; \$18.22 per hour in Alameda County; \$17.03 per hour in San Diego County  
 Job Number 2(Job Creation): \$13.66 per hour in San Bernardino County; \$15.18 per hour in Alameda County; \$14.19 per hour in San Diego County

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

**Used to meet the Post-Retention Wage?:**  Yes  No  Maybe  
 Up to \$2.05 per hour may be used to meet the Post-Retention Wage for Job Numbers 1 & 2.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Engineer		4
Finance Staff		26
Food Science/Technical Staff		6
IT Staff		10
Logistics		17
Managers & Supervisors		64
Office Staff		20
Research & Development Staff		3
Sales & Customer Service Staff		11
Maintenance Staff		41
Production Staff		23

Quality Staff		7
Sanitation Staff		15
Warehouse Staff		14
<b>Job Number 2</b>		
Office Staff		5
Sales & Customer Service Staff		5
Sanitation Staff		12
Production Staff		56
Warehouse Staff		12
Maintenance Staff		5

## **INTRODUCTION**

Ajinomoto Foods North America, Inc. (AFNA) ([www.ajinomotofoods.com](http://www.ajinomotofoods.com)) is a wholly-owned subsidiary of Ajinomoto North America Holdings, Inc. AFNA manufactures and markets high-quality specialty ethnic frozen foods and appetizers for direct consumers, commercial restaurants and foodservice operations from 10 plants in 8 states. The Company's products are sold across every distribution channel including foodservice, grocery and warehouse clubs. Headquartered in Ontario, AFNA has three locations in California (Ontario, Hayward and San Diego). All three locations will participate in training.

## **PROJECT DETAILS**

Currently, AFNA is experiencing growth across all of its California locations. In April 2018, AFNA purchased Circle Foods, a subsidiary of Tyson Foods in San Diego. Simultaneously, AFNA purchased the 165,763 sq. ft. manufacturing facility at the Circle Foods location. As a result of this acquisition, AFNA hired 300 new employees in 2018 at this facility and staff requires extensive training to meet AFNA's quality and manufacturing requirements. In addition, the San Diego location anticipates will hire approximately 398 additional positions over the next two years to fully staff this facility.

AFNA is also redesigning the layout of its Hayward facility to improve production workflow. This redesign will include additional machinery to address a shortage of pot stickers in the U.S., and improve the sanitation and safety processes. This will require additional staff on the production line to achieve successful equipment operations. The Hayward facility is developing an in-house sanitation team, previously outsourced, to meet strict industry safety standards.

In addition, the Company is launching new products including a new in-house tortilla manufacturing production line, new private label and quick serve products, as well as snacking and on-the-go products. These new lines are being implemented companywide and will affect all locations in California. As a result, AFNA will invest up to \$25M in new food processing equipment facility renovations from 2018-2021. The new manufacturing equipment is highly sophisticated and is partially or fully automated.

Finally, the Company is working to implement Lean manufacturing processes at all locations in California. This requires that staff are upskilled on changes to their positions and ensure all new staff are successfully integrated into the productions lines. This will also require cross-training in an effort to internally promote staff.

## **Green/Clean Operations**

AFNA complies with environmental regulations at all locations, as well as established voluntary standards which seek to minimize the impacts of its manufacturing on the environment and ecosystems. The Company utilizes environmental management systems to reduce negative impacts on the environment.

## **Retrainee - Job Creation**

The Panel offers incentives to companies that commit to hiring new employees. Due to expanding business capacity by adding newly-hired employees to an existing function and upgrading existing facilities, AFNA has committed to hiring 95 net new staff (Job Number 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into “net new jobs” as a condition of contract.

As a part of the Company’s growth plan discussed earlier, AFNA is adding new production lines and equipment, and upgrading its San Diego and Hayward facilities. As a result, the Company plans to hire 10 new staff at the Hayward facility, 10 at the Ontario facility and at least 75 at the newly acquired San Diego facility.

## **Training Plan**

Training will be provided via Class/Lab, Productive Lab and Computer-Based Training (CBT) in the following:

**Business Skills:** Product Knowledge, Forecasting and Analysis, Business Communication

**Continuous Improvement:** LEAN Manufacturing, Quality Assurance and Root Cause Analysis

**Management Skills:** Communication Skills, Effective Teams, Problem Solving

**Manufacturing Skills:** Good Manufacturing Practices, Pasteurization, Raw Milk Receiving, Micro Organisms, Food Allergens

## **Productive Laboratory**

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

PL training will be provided for approximately 154 Production, Maintenance and Sanitation Staff to ensure that staff is trained on manufacturing equipment and procedures. The Company requesting a trainer-to-trainee ratio 1:3 for staff to be fully trained within the context of a demanding production schedule. Production will be slowed and product defects are expected while PL training is occurring. In-house experts will perform PL training. Trainees will receive approximately 60 hours of PL training.

## **Temporary to Permanent Hiring**

AFNA will train 10 workers in Job Number 2 (Hayward facility) under Panel guidelines for the Temporary-to-Permanent program. The Company has retained these employees on a temporary basis, with the intention of hiring them into full-time, permanent positions after training. The average time for “converting” temporary workers into full-time permanent employment is six

months. It is expected that these workers will receive employer-paid share-of-cost for healthcare premiums upon hire into full-time permanent employment.

Under Panel guidelines for the Temporary to Permanent program, these trainees must be eligible to participate in ETP-funded training pursuant to Unemployment Insurance Code. Moreover, trainees cannot be enrolled until they have been hired by AFNA 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.

### **Commitment to Training**

AFNA spends approximately \$130,000 on training, and includes mandatory safety training, federally regulated training, legal compliance, new-hire orientation, skill gap training and continuing education for finance and legal position. ETP funds will not displace the existing financial commitment to training. Safety training is provided in accordance with all pertinent requirements under state and federal law.

#### ➤ Training Infrastructure

AFNA is ready to start training upon approval. The Corporate Senior Manager of Environmental Health & Safety will oversee project administration. Program Administrators at each facility will provide support with tracking and training administration. These staff members will assist with the scheduling of training, uploading of training hours and managing the LMS. In addition, AFNA has hired Economic Incentives Advisory Group (EIAG) to assist with administrative duties. Training will be delivered by in-house experts and vendors as needed.

### **Electronic Recordkeeping**

AFNA will use a Learning Management System to schedule, track and document training. This system has been reviewed and approved by ETP staff.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **DEVELOPMENT SERVICES**

EIAG in Phoenix, AZ assisted with development for a flat fee of \$12,500.

### **ADMINISTRATIVE SERVICES**

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

### **TRAINING VENDORS**

To Be Determined



**Exhibit B: Menu Curriculum**

**Class/Lab Hours**

8 – 200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Training Techniques
- Product Knowledge
- Forecasting and Analysis
- Business Communication

**CONTINUOUS IMPROVEMENT**

- Audits
- LEAN
- Quality Assurance
- Root Cause Analysis

**MANAGEMENT SKILLS** (Managers/Supervisors Only)

- Being a Successful Supervisor
- Communication
- Conducting a Huddle Talk
- Effective Teams
- Hazard Analysis Critical Control Point (for managers)
- Productive Labeling Skills
- Solving Problems at Work

**MANUFACTURING SKILLS**

- Air Hose Safety
- Ammonia Training
- Asbestos Training
- Bacteria Training
- Basic Food Defense
- Bloodborne Pathogens
- Clean-in-Place
- Cold Chain
- Combustible Dust
- Controls
- Dangerous E. Coli
- Dangerous Microorganisms
- Electrical Safety
- Environmental Monitoring
- Food Allergens
- Food Defense
- Food Fraud
- Food Plants
- Food Safety Standards
- Foodborne Illness
- Foreign Object
- Forklift
- Good Laboratory Practices
- Good Manufacturing Practices

- Hand and Power Tools
- Hazard Analysis Critical Control Point
- Hazardous Communication
- Knife Safety
- Lift Truck
- Listeria Training
- Lock Out/Tag Out
- Machine Guarding
- Materials Handling
- Micro Organisms
- Pallet Truck
- Pasteurization
- Personal Protective Equipment
- Preventing Food Contamination
- Preventing Foodborne Illness
- Raw Milk Receiving
- Record Keeping
- Respirators
- Salmonella Training
- Understanding Listeria
- Warehouse Standard Operating Procedures
- Waste Management
- Water Hose Safety

**Productive Lab Hours**

0 – 60

**MANUFACTURING SKILLS** (Ratio 1:3)

- Machinery and Conveyor Training
- Bakery Functions
- Sanitation Processes
- Equipment Maintenance
- Ammonia Training
- Bacteria Training
- Bloodborne Pathogens
- Environmental Monitoring
- Food Allergens
- Food Defense
- Food Safety Standards
- Foodborne Illness
- Foreign Material Control
- Forklift
- Good Manufacturing Practices
- Hazard Analysis Critical Control Point
- Hazardous Communication
- Lift Truck
- Listeria Training
- Lock Out/Tag Out
- Machine Guarding
- Safe Quality Food

- Salmonella Training
- Water Hose Safety

### **Computer-Based Training Hours**

0 -100

#### **MANUFACTURING SKILLS**

- Air Hose Safety 0.12
- Ajinomoto Culture of Quality 0.75
- Allergen Control AJIWIN 0.75
- Ammonia Accident Prevention and First Aid 0.33
- Ammonia Awareness 0.33
- Ammonia Awareness 0.50
- Asbestos Awareness 0.27
- Bacteria Basics 0.25
- Basic Food Defense for Drivers 0.03
- Basic Food Facility Defense 0.33
- Basic Food Facility Defense - Refresher 0.17
- Being a Successful Supervisor 0.32
- Bloodborne Pathogens 0.25
- CIP: Introduction 0.28
- Cleaning and Sanitizing in a Dry Foods Facility 0.35
- Cleaning and Sanitizing Procedures for Food Manufacturers 0.38
- Combustible Dust 0.28
- Communicating Effectively in the Workplace 0.28
- Communication and Trust 0.25
- Controlling Salmonella in Food Manufacturing 0.32
- Dangerous Microorganisms in Food Manufacturing (Fahrenheit) 0.40
- Driver Food Safety SOPs - LTL Delivery Stops 0.05
- Driver Food Safety SOPs - Maintaining Proper Temperature 0.03
- Driver Food Safety SOPs - Pre-chilling Procedures 0.03
- Driver Food Safety SOPs - Trailer Maintenance 0.03
- Effective Pest Control Practices 0.32
- Effective Record Keeping Practices 0.27
- Electrical Safety 0.50
- Environmental Monitoring Basics 0.37
- Hazard Communication (pre-GHS) 0.35
- Overview of Preventive Controls 0.28
- Food Safety for Selectors - Overview 0.12
- Food Safety for Selectors - Safe Pallet Building Practices 0.10
- Food Safety SOPs - Pre-Load Temperature Checks 0.07
- Foodborne Illness and Employee Reporting 0.37
- Introduction to Food Fraud 0.23
- GHS Hazard Communication: Pictograms and Hazards 0.45
- GHS Hazard Communication: Pictograms and Hazards - Refresher 0.18
- Introduction to Pasteurization 0.07
- Overview of the Raw Milk Receiving Process (US) 0.30
- GMPs for Maintenance Personnel 0.28
- GMPs: Effective Hand Washing Techniques 0.28
- GMPs: Effective Hand Washing Techniques - Refresher 0.12

- GMPs: Personal Hygiene - Distribution 0.22
- GMPs: Promoting Personal Hygiene 0.27
- GMPs: Promoting Personal Hygiene - Refresher 0.13
- GMP's AJIWIN 1.00
- Hand and Power Tools 0.33
- Hayward - Alchemy Platform Overview 1.00
- High Lift Truck Review 0.27
- Implementing Productive Labeling and Observations 0.13
- Introduction to Fire Extinguishers 0.48
- Introduction to Food Allergens 0.28
- Introduction to Food Allergens - Refresher 0.12
- Introduction to Food Safety Standards 0.30
- Introduction to Food Safety Standards and BRC 0.33
- Introduction to Food Safety Standards and SQF 0.33
- Introduction to FSMA 0.28
- Introduction to Hazard Communication 0.25
- Lean Manufacturing 0.27
- Lift Truck Operator Overview 0.28
- Lift Truck Safety Awareness 0.22
- Loading Food Safety SOPs - Overview 0.03
- Knife Safety Basics (Product Knives) 0.22
- Maintaining the Cold Chain 0.30
- Machine Guarding 0.38
- Material Handling - Distribution 0.27
- Introduction to Respirators 0.28
- Motivation, Discipline and Goals 0.27
- Overview of Dangerous E. coli 0.37
- Overview of Dangerous E. coli - Produce 0.33
- Overview of HACCP 0.27
- Overview of HACCP - Frozen Foods 0.27
- Overview of HACCP - Refresher 0.17
- Overview of HACCP for Supervisors 0.50
- Pallet Truck Review 0.20
- GHS Hazard Communication: Standard Labels 0.35
- GHS Hazard Communication: Safety Data Sheets 0.45
- Patience, Consistency and Getting the Job Done 0.22
- Personal Protective Equipment (PPE) 0.28
- Preventing Food Contamination 0.35
- Preventing Food Contamination - Frozen Foods 0.40
- Preventing Foodborne Illness 0.25
- Lock Out / Tag Out Procedures - Refresher 0.15
- Proper Handling of Food Allergens 0.30
- Proper Handling of Food Allergens - Refresher 0.15
- Receiving Food Safety SOPs - Can Inspection 0.03
- Receiving Food Safety SOPs - Overview 0.25
- Lift Truck Safety Awareness - Refresher 0.13
- GHS Hazard Communication: Standard Labels - Refresher 0.20
- GHS Hazard Communication: Safety Data Sheets - Refresher 0.18
- Lockout/Tagout Procedures 0.33
- Introduction to Root Cause Analysis 0.28

- GLPs: Overview of Good Laboratory Practices 0.18
- Solving Problems at Work 0.33
- Exploring the Roles and Behaviors of a Productive Labeling 0.17
- Understanding Listeria and its Dangers to Food 0.35
- Understanding Listeria and Its Dangers to Food - Produce 0.37
- Waste Management Procedures and Proper Disposal 0.22
- Water Hose Safety 0.20
- Working at Height 0.22
- ATFN - ILT - Annual Refresher 4-20 (Allergen Control) 1.00

Safety Training cannot exceed 10% of total training hours per-trainee  
This cap does not apply to OSHA 10/30.

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



**RETRAINEE - JOB CREATION**

**Training Proposal for:**

**Auto Center Auto Body, Inc. dba Fix Auto**

**Agreement Number: ET19-0271**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** San Diego

**Analyst:** M. Ibarra

**PROJECT PROFILE**

Contract Attributes:	SET Job Creation Initiative Veterans Retrainee	Industry Sector(s):	Services (G)  Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Counties Served:	Orange, Riverside, San Bernardino	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 212	U.S.: 212	Worldwide: 212
<u>Turnover Rate:</u>	6%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$399,950		\$0	\$0		\$399,950

In-Kind Contribution:	100% of Total ETP Funding Required	\$640,000
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET	Business Skills, Comm'l. Skills, Computer Skills, Cont. Imp., HazMat, PL-Comm'l. Skills	116	8 - 200	0	\$2,530	\$30.36
				Weighted Avg: 110			
2	Retrainee SET Job Creation	Business Skills, Comm'l. Skills, Computer Skills, Cont. Imp., HazMat, PL-Comm'l. Skills	30	8 - 200	0	\$3,042	\$13.66*
				Weighted Avg: 117			
3	Retrainee SET Job Creation Veterans	Business Skills, Comm'l. Skills, Computer Skills, Cont. Imp., HazMat, PL-Comm'l. Skills	5	8 - 200	0	\$3,042	\$13.66*
				Weighted Avg: 117			

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

**Minimum Wage by County:** Job Number 1 (SET): \$30.36 per hour  
 Job Numbers 2 (Job Creation) & 3 (Job Creation/Veteran): \$14.58 per hour for Orange; and \$13.66 per hour for Riverside and San Bernardino Counties

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

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

Health benefits of up to \$1.00 per hour for Job Number 1 and up to \$0.16 per hour for Job Numbers 2 & 3 may be used to meet the Post-Retention Wage. Commissions will also be used to meet the required SET hourly wage for Technicians in Job Number 1.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Technician		64
Repair Planner		20
Production		7
Team Lead		9
Operations		2
Accounting		2

Human Resources		2
Administrative Support		10
<b>Job Numbers 2 &amp; 3</b>		
Technician		21
Repair Planner		7
Team Lead		3
Administrative Support		4

## **INTRODUCTION**

Founded in 1984, Auto Center Auto Body, Inc. dba Fix Auto (Fix Auto) ([www.fixauto.com](http://www.fixauto.com)) provides automotive collision and mechanical repair including sales of associated parts and accessories, and facilitates towing and rental car services relevant to vehicle repairs. The Company serves consumers, insurance companies and fleet accounts. The Company has preferred partnerships with insurance companies including State Farm, Farmers, USAA, CSAA, Allstate, Geico, Progressive, Allied Nationwide, among others.

Including its headquarters in Yorba Linda, Fix Auto currently maintains 10 facilities in Southern California: Orange (7); Riverside (1); and San Bernardino (2) Counties. All locations will participate in training.

### **Veteran Program**

The Company plans to hire and train five Veterans (3 Technicians and 2 Repair Planners) in the necessary skills to successfully enter the workforce, work in the auto body repair industry, and improve their opportunities for advancement.

## **PROJECT DETAILS**

This will be Fix Auto's third ETP Agreement, and the third in the last five years. Previous training focused on software program updates, Commercial and Manufacturing Skills. The Company trained workers in electric and alternative fuel vehicle estimating as well as repair methods and skills to meet the needs of hybrid, electric, and alternative materials (aluminum) vehicles.

The auto industry has undergone substantial changes in the last four years due to governmental requirements to increase vehicle fuel efficiency. To keep up with these changes, auto manufacturers continue to introduce different types of vehicles, those that are made from lighter metals as well as vehicles with alternative fuel systems. As a result, Fix Auto must be able to work with these metals and understand how body repairs differ based on the metal composition of the vehicle. Further, the Company must keep pace with the way auto body repairs are done and how costs are estimated.

In addition, there is an industry shortage of Technicians and Repair Planners. The attrition for skilled workers who are retiring or nearing retirement is increasing; and the loss of high school, community college, and vocation school auto shop programs have impacted both training and recruiting skilled workers.

Fix Auto has developed a strategic plan to improve its technological and business processes. The Company recently invested \$445K in implemented electronic vehicle scanning systems, 3D computerized measuring systems, and resistance spot welders. Additionally, Fix Auto is committed to provide its entire workforce a comprehensive training program focused in upgrading knowledge, skills,



and competencies to successfully repair new technology vehicles; as well as perform claims process using software platforms for digital imaging, electronic transmitting, and video documentation.

ETP funding will help provide supplemental training for new Technicians and Repair Planners who require up to 1,500 hours in their first year of employment, and incumbent workers who require up to 1,000 hours a year. Funding will allow Fix Auto to augment training in new technologies, tooling, processes, and cross-training to provide new and further enhance employee's knowledge and skill sets, as well as meet various industry and customer standards.

The proposed training plan may include employees who have participated in previous ETP contracts. Some curriculum topics are repeated; however, the subject matter has been updated and/or improved. There will be no duplication of training. In addition, the proposed training plan includes a significant number of newly-hired employees.

### **Retrainee-Job Creation**

The Panel is offering incentives to companies that commit to hiring new employees. Training for newly-hired employees will be subject to a lower post-retention wage.

Fix Auto continues to grow and has increased its fulltime employees by 6% in the last year. In addition, Fix Auto plans to add a new location in Brea (Orange County) by Q1 of 2019. The Company also plans to expand select existing facilities in Orange, Costa Mesa and Ontario. To support the implementation of new equipment mentioned above and to maintain the Company's growth, Fix Auto plans to increase its fulltime workforce by hiring at least 35 net, new employees (Job Numbers 2 & 3): 21 Technicians, 7 Repair Planners, 3 Team Leads, and 4 Administrative Support Staff.

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

### **Training Plan**

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

**Business Skills:** Training topics include Customer Care Skills, Advanced Sales & Marketing Skills, Negotiation Skills, Conflict Resolution, Communication Skills and Presentation Skills.

**Commercial Skills:** Training topics include I-CAR Collision Repair Certification Skills, Refinishing Skills, Structural Repair, Non-Structural Vehicle Repair Skills, Estimating Skills, Direct Repair Program Compliance, Vehicle Check-In Process, Vehicle Delivery Process and Photo Documentation.

**Computer Skills:** Training topics include CCC One Info Systems Software, Mitchell & Mitchell Repair Center Software, Alldata Software, Microsoft Office Suite (Intermediate/Advanced), and Accounting Systems Mass 200 & QuickBooks Application Skills.

**Continuous Improvement:** Training topics include Leadership Skills, Teambuilding, Root Cause Analysis, Lean Concepts, Process/Quality Improvement, Problem Solving/Decision Making Skills, Inventory Control, Process Design, Coaching for Team Leaders, Profit & Loss Management Skills, Key Metrics Management Skills, Change Management Skills, and Employee Engagement Skills.

**Hazardous Materials:** Training topics include Completing Material Safety Data Sheets, Volatile Organic Compound Tracking, Emergency Clean-Up, and Registration, Evaluation, Authorization & Restriction of Chemical Substances.

## **Productive Laboratory – Commercial Skills**

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

Fix Auto currently provides an average of 600 hours of PL training annually. The need is substantial due to the absolute differences in vehicle collision repair processes and types of manufacturing methods. PL training is necessary to successfully work through various repair/tooling scenarios on customer vehicles in real time. PL training will allow the Company to provide hands-on training to Technicians and Repair Planners to address the lack of industry-specific skills training. Training will include Body Filler Methods, Color Tinting, Aluminum Repair and Vehicle Blueprinting.

The Company will deliver up to 60 hours of PL-Commercial Skills training to 68 Technicians and Repair Planners. Fix Auto requests to conduct PL training in a 1:3 trainer-to-trainee ratio. The Company usually trains in small groups to give trainees the opportunity to work through multiple repair/tooling scenarios on customer vehicles in real time. Normal production will be reduced by approximately 30% due to the trainer and trainee's inability to perform tasks while engaged in the training process.

Trainers are journey-level Technicians with experience necessary to facilitate expected outcome. Technician trainers may be ICAR, ASE, or master-trained employees or outside vendors. Fix Auto will implement performance management process to ensure compliance and proficiency. Additionally, client spot-checks quality and process standards for Technicians using a third-party repair procedure and quality analyst. Insurers utilize metrics scorecards to determine proficiency for quality.

## **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.

## **Commission**

Fix Auto has a formal Commission Plan which are calculated and paid twice monthly. The Company will use commissions to meet the Post Retention Wage of \$30.36 for Technicians in Job Number 1. Commission for these occupations is based on a percentage of services rendered and sold as well as company profits.

Technicians receive a variable commission based on a percentage of Fix Auto's labor rate; number and type of cars receiving service; and the level of employee expertise plus years of service. Monthly commission for 64 Technicians (Job Number 1) for the last 12 consecutive ranged between \$8 and \$20 per hour, with an average of \$15.20 per hour. All Technicians will earn at least \$30.36 per hour with the use of Commissions and, if needed, employer-paid health benefits of up to \$1.00 per hour.

## **Impact/Outcome**

ETP funding will help Fix Auto to increase revenues, raise efficiency levels, and provide a higher level of customer satisfaction. Funding will enable the Company to supplement and implement extensive training for newly hired and incumbent trainees needed to respond to changing standards and technologies in the auto body repair industry.

## Commitment to Training

The Company's annual training budget per facility is \$75,000 and includes basic new employee orientation, harassment/violence in the workplace prevention, basic computer skills, ethics, safety, and on-the-job training. This training will be provided at ACAB's expense during the term of the proposed agreement and beyond. The Company also provides various commercial skills training as it pertains to the worker's job functions. 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

ETP training will begin upon contract approval. The Chief Financial Officer will oversee project implementation and administration. The corporate Human Resources Staff, Team Leads and Regional Managers at each facility will assist with training implementation. Training will be delivered by in-house experts and vendors as needed.

## Green/Clean Operations

Fix Auto is also involved in Green Technology on two fronts: uses green/clean facilities and repair methodologies for electric/hybrid and alternative fuel/power plant technologies; and subscribes to reducing carbon footprints by utilizing low Volatile Organic Compound refinish products and processes; and cleaning products and processes.

## RECOMMENDATION

Staff recommends approval of this proposal.

## ACTIVE PROJECTS

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
17CS-0016	\$258,924	6/5/17 – 6/4/19	136	136	0

As of 8/4/18, Fix Auto documented 16,640 eligible training hours to equal more than 100% of the Agreement amount for 136 trainees. The Company has submitted and received \$194,193 in progress payments and will submit the final closeout invoice once all trainees complete retention.

## PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0360	Anaheim, Irvine, Corona, Montclair, Buena Park, Ontario, Orange, Yorba Linda	2/2/15 – 2/1/17	\$118,925	\$118,925 (100%)

**DEVELOPMENT SERVICES**

Synergy Management Consultants in Grass Valley assisted with development for a flat fee of \$23,750.

**ADMINISTRATIVE SERVICES**

N/A

**TRAINING VENDORS**

Fix Auto retained the following training vendors to provide various Commercial Skills training in connection with this proposal:

- ICAR in Los Angeles for a fee of \$25,000;
- Axalta Coating in Los Angeles for a fee of \$15,000;
- Finish Master in Los Angeles for a fee of \$15,000;
- 3M Coatings in Los Angeles for a fee of \$10,000;
- Assured Performance in Laguna Hills for a fee of \$18,000;
- Verifacts Automative in Newport Beach for a fee of \$58,500;
- Collission Career Institute in Yorba Linda for a fee of \$25,000; and
- Fix Auto USA in San Diego for a fee of \$25,000.

Trainers will be identified for ETP recordkeeping purposes, as they are retained.

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

8 – 200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Customer Care Skills
  - Setting Expectations
- Advanced Sales & Marketing Skills
  - Closing Sales
  - Confidence/Self-Esteem
  - DRP Management
  - Overcoming Customer Objections
  - Consultative Sales Skills
- Negotiation Skills
- Conflict Resolution
- Communication Skills
- Presentation Skills

**COMMERCIAL SKILLS**

- I-CAR Collision Repair Certification Skills
- Refinishing Skills
  - Surface Preparation
  - Paint Spray Guns Maintenance & Set-Up
  - Corrosion Protection Process
  - 3M Detail Skills/Polishing
  - Color Matching Skills
  - Blending and 3 Stage Techniques
  - New Technologies/Products
- Structural Repair
  - Unibody Alignment
  - Three Dimensional Measuring
  - Repair & replacement of Outer Body Panels
  - MIG Welding
  - Aluminum Welding
  - Plastic Repair Welding
  - Straightening Structural Damage
  - Pillars, Rocker Panels, Rails, Front Structures & Floor Pan Replacement
  - Heating Cooling and AC Systems
  - Steering & Suspension Systems
  - Advanced Vehicle Systems
  - Composite Materials and Bonding Techniques
  - Unibody Measuring and Diagnostics Plan
  - Car-o-Liner
- Non-Structural Vehicle Repair Skills
  - Remove & Install Trim & Hardware
  - Adhesive Bonding
  - Aluminum Cosmetic Damage
  - Spot Welding
  - Composite Repair

- Estimating Skills
  - Steering & Suspension System Damage Analysis
  - Damage on Non-Drivable Vehicles
  - Electrical/Mechanical Systems
  - Advanced Materials
  - Advanced Vehicle Systems
  - Vehicle Blueprinting
  - Vehicle Disassembly
- Direct Repair Program (DRP) Compliance
  - DRP Estimate Upload Process
- Vehicle Check-In Process
- Vehicle Delivery Process
- Photo Documentation
- File Quality Auditing-Closing
- Vehicle QC Quality Control
- Vehicle Operation, Maintenance & Troubleshooting
- Alternative Fuel & Hybrid Vehicle Repair Diagnostics
- Product Knowledge
- Original Equipment Manufacturer (OEM) Knowledge/Skills
- Nissan, Infinity, Hyundai, Kia, Acura, Honda OEM Certification
- Pre/Post Scanning/Computer Recalibration

#### **COMPUTER SKILLS**

- CCC One Info Systems Software
  - Job Costing
  - Production Flow
  - Production Planning - ETA Times & Dates
  - Internal & External Customer Communication
  - Parts Check In and Posting
- Mitchell & Mitchell Repair Center Software
- Alldata Software
- Microsoft Office Suite (Intermediate/Advanced)
- Accounting Systems Mass 200 & QuickBooks

#### **CONTINUOUS IMPROVEMENT**

- Leadership Skills
- Teambuilding
- Root Cause Analysis
- Lean Concepts
- Process/Quality Improvement
- Problem Solving/Decision Making Skills
- Inventory Control
- Process Design
- Coaching for Team Leaders
- Profit & Loss Management Skills
- Key Metrics Management Skills
- Change Management Skills
- Employee Engagement Skills

**HAZARDOUS MATERIALS**

- Completing Material Safety Data Sheets
- Volatile Organic Compound Tracking
- Emergency Clean-Up
- Registration, Evaluation, Authorization & Restriction of Chemical Substances

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

**Productive Lab Hours**

0 – 60

**COMMERCIAL SKILLS** (Ratio 1:3)

- Body Filler Methods
- Structural Resistance Spot Welding
- Metal Inert Gas Brazing Techniques
- Color Tinting
- Spraying/Blending Techniques
- Measuring Vehicle Structures
- Unibody Measuring and Diagnostics Plan-CarTronic
- Alignment Process for Full Frame Vehicles
- Aluminum Repair
- Technical Collision Estimating/Repair Planning
- Direct Repair Collision Estimating SOPs
- Pre-Post Scan
- Vehicle Disassembly
- Vehicle Blueprinting
- File Quality/Audit for Closing
- Vehicle Quality Control
- Vehicle Check In
- Vehicle Delivery

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



**Training Proposal for:  
Service Champions, Inc.**

**Agreement Number: ET19-0223**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** San Diego

**Analyst:** H. Bernard

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate SET	Industry Sector(s):	Construction Services  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Orange	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 215	U.S.: 215	Worldwide: 215
<u>Turnover Rate:</u>	11%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$304,200		\$0	\$0		\$304,200

In-Kind Contribution:	100% of Total ETP Funding Required	\$500,022
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET	Business Skills, Commercial Skills, Computer Skills, Cont. Improv.,	150	8 - 200	0 - 100	\$2,028	\$22.77
				Weighted Avg: 78			

**Minimum Wage by County:** Job Number 1 (SET Priority) \$22.77

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

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

Up to \$0.85 per hour may be used to meet the Post-Retention Wage.

**Other Compensation:** Incentive pay (“bonus”), which is a normal, recurring part of SCI’s employee compensation for all occupations, may be used, in addition to health benefits, for some trainees to meet the ETP minimum wage. Over the previous twelve months the bonus amount ranged from \$0.06 to \$21.07 per hour. The average bonus amount was \$3.55 per hour. Approximately 50% of the staff from all occupations may need incentive pay, in addition to health benefits, to meet the ETP minimum wage.

SCI also has a formal Commission Plan that is a regular part of the compensation structure for Service Technicians/Installers which is paid on a monthly basis and is based on a sliding scale between 3-10% commission rate for sales achieved by the Technician. Over the previous twelve months, the Commission amount ranged from \$0.00 to \$22.21 per hour. The average monthly Commission amount was \$6.79 per hour.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Fontline Lead/Supervisor/Manager		25
Service Technician/Installer		90
Customer Service/Dispatch		15
Corporate Support/Operations Staff		20

**INTRODUCTION**

Founded in 2000, with one location in Orange County, Service Champions, Inc. (SCI) ([www.servicechampions.com](http://www.servicechampions.com)) specializes in installing, diagnosing, and repairing Heating, Ventilation and Air Conditioning (HVAC) systems. SCI’s sole location in Brea will participate in training under this project. The Company qualifies for funding under Special Employment Training (SET) guidelines as a priority industry specialty contractor not facing out-of-state competition. This will be the second Agreement between ETP and SCI, the second in the last 5 years.

## Veterans Program

The Panel has established incentives for training California veterans. SCI is active in recruiting veterans with organizations such as “Hire a Vet” and “Hire a Hero” and participates in jobs fairs and outreach efforts to hire veterans. Service Champions is not requesting a Veteran Job Number under this project but will identify Veterans via the ETP enrollment process.

## PROJECT DETAILS

Training in SCI’s first ETP project (ET16-0368) focused on improving processes and new technologies. During that project SCI invested and train staff in duct work and launched an insulation division.

The Company continues to develop that section of its business and is in the process of adding duct-specific crews to its team. Given the consumer demand for energy efficiency, this is now one of the fastest growing business segments for SCI. The Company is also expanding its Indoor Air Quality (IAC) line with products that are installed with ducts that reduce allergens and mold.

Technology utilized in the HVAC industry is sophisticated. According to the US Bureau of Labor Statistics, the industry is expected to grow by 14% over the next few years. Increasing business activity and consumer spending have benefitted business expansion plans and supported new construction. In addition, there is a growing focus on energy usage resulting in a higher demand for energy efficient systems.

In order to meet industry needs and stay competitive, SCI must upgrade its systems and products. SCI is meeting this need by installing and servicing “smart equipment”, including thermostats which have the capability to communicate with each other. Equipment Manufacturers are creating increasingly sophisticated smart equipment to integrate all HVAC systems into a “smart home”. Smart homes have the capability to turn equipment on and off and adjust based on an individuals’ proximity to their home and create ideal living situations based on individual needs. SCI staff must remain current on these and other technological changes.

SCI is also in the process of implementing a new ERP system, Service Titan. While the Company anticipated selecting a new ERP during the term of the previous ETP Agreement, the selection process was delayed as the first software provider selected could not meet the Company’s needs. Nevertheless, SCI was able to redirect available ETP training funds to additional training hours for the approved training in the curriculum. The new system is now expected to be implemented in the fall of 2018, and plans to deploy the first phase of training in early 2019. This system will replace two legacy systems, streamlining activities and communications across multiple departments. The new system will maximize efficiencies for scheduling, tracking parts, returns, repairs and inventory management and will require training for most staff.

## Training Plan

Training will be provided via Class/Lab by internal trainers in the following:

**Business Skills:** Client Service/Communication, Coordinating and Scheduling Service/Dispatching, Finance & Accounting Skills and Marketing.

**Commercial Skills:** Electricity/Voltage & Schematics, Principles of Electronics, Residential Cooling/Heating Equipment and Installation Skills, Residential Indoor Air Quality, Residential Smart Equipment Technology

**Computer Skills:** Call Center/Dispatch Application Skills, Intermediate Microsoft Office, Service Titan ERP System and Table Computer Applications

**Continuous Improvement:** Change Management Skills, Leadership Skills, Process Mapping/Improvement Skills, Project Management Skills and Root Cause Analysis

**Computer Based Training (CBT):** CBT will be provided to staff in Commercial Skills. SCI expects staff to receive up to 36 total hours of CBT training.

### **Green/Clean Operations**

As part of its Indoor Air Quality line of products and services, SCI offers products such as powered air filters, air scrubbers and UV lights that filter harmful particles from the air. In addition, the Company is implementing new products that utilize green technology including: BioGuard Powered Filter which attaches to the bottom of a furnace and through an electrostatic field delivers cleaner air throughout a home; AirScrubber which treats and purifies air in a home ensuring that surfaces, countertops, furniture, etc. are cleaner; and anti-microbial ducts which prevent mold and allergens.

### **Commitment to Training**

SCI currently spends \$510,000 annually on training including Sexual Harassment Prevention, New Hire Orientation, OSHA required training, and hydration on the job. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

#### ➤ Training Infrastructure

The Company's General Manager will oversee the proposed project with assistance from the Human Resources Director. These staff will ensure that training is scheduled and training rosters are tracked accordingly. SCI has hired a third party administration, Training Funding Partners, to assist with the project administration. Training will be provided by internal trainers and external training vendors to be determined.

### **Special Employment Training**

Under SET, the participating employer is not required to demonstrate out-of-state competition. To qualify under SET, trainees must be earning at least the statewide average hourly wage at the end of the retention period. However, Service Champions is in a priority industry and as such, trainees must be earning the statewide modified average hourly wage.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0368	Brea, Los Angeles	2/29/16 – 2/28/18	\$462,380	\$462,380 (100%)

## **DEVELOPMENT SERVICES**

SCI retained Training Funding Partners in Fountain Valley to assist with development of this proposal for a flat fee of \$22,500.

## **ADMINISTRATIVE SERVICES**

Training Funding Partners 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**

- Business Processes & Procedures
- Client Service/ Communication Skills
- Coordinating and Scheduling Service/Dispatching
- Equipment and Industry Overview
- Finance/Accounting Skills
- Logistics/Warehouse Skills
- Maintenance/Membership Programs
- Marketing
- Sales/Quoting
- Train-the-Trainer

**Commercial Skills**

- Electricity/Voltage & Schematics
- Principles of Electronics
- Residential Cooling/Heating Equipment and Installation Skills
- Residential Cooling/Heating/Maintenance Skills
- Residential Ducting/Equipment and Installations
- Residential Indoor Air Quality
- Residential Smart Equipment Technology/Controls
- System Troubleshooting

**Computer Skills**

- Call Center/Dispatch Application Skills
- Intermediate/Advanced Microsoft Office (Word, Excel, PowerPoint)
- Payment Card Certification
- Service Titan ERP System
- Tablet Computer Applications

**Continuous Improvement Skills**

- Change Management Skills
- Leadership Skills
- Problem Solving Skills
- Process Mapping/Process Improvement Skills
- Project Management Skills
- Root Cause Analysis and Remediation
- Time Management Skills

**CBT Hours**

0-100

**Commercial Skills**

- A/C Electrical Troubleshooting (.5 hour)
- A/C Practical Readings and Measurements (.5 hour)
- Achieving Proper Airflow in Retrofit Applications (.5 hour)
- Airflow & the Refrigeration System / Metering Devices (.5 hour)
- Airflow and Static Pressure (.5 hour)
- Basic Electric Motors (.5 hour)
- Brazing and Leak Testing R-410A Systems (.5 hour)
- Brazing Refrigerant Lines (.5 hour)
- Calculations CFM (.5 hour)
- Causes of Compressor Failures (1.5 hours)
- Checking and Sealing Ductwork (.5 hour)
- Checking Capacitors (.5 hour)
- Checking Electric Motors (.5 hour)
- Checking Two-Stage Cooling (.5 hour)
- Checking Two-Stage Heating (.5 hour)
- Commissioning the Residential System 2 Gas Furnaces (.5 hour)
- Components of Total Comfort (.5 hour)
- Compressor Change-Out (.5 hour)
- Compressor Change-Out Procedure (1 hour)
- Compressor Diagnostics (.5 hour)
- Controlling Humidity for Comfort (.5 hour)
- Cooling Tune-Up (Heat Pump) (.5 hour)
- Diagnosing Control Boards (1.5 hours)
- Differential Pressure Controls in Gas Furnaces (.5 hour)
- Electrical Systems Part 1 (.5 hour)
- Electrical Systems Part 2 (.5 hour)
- Electrical Troubleshooting Series 1 - Air Conditioning (.5 hour)
- Electricity at Work (.5 hour)
- Furnace Practical Readings & Measurements (.5 hour)
- Furnace Sequence of Operation (.5 hour)
- Gas Valves (.5 hour)
- Heat Exchanger Inspections (1.5 hours)
- Heat Pump Charging and Troubleshooting (.5 hour)
- Heat Pump Defrost Controls (.5 hour)
- Heat Pump Operation (.5 hour)
- Heat Pump Reversing Valves Troubleshooting (.5 hour)
- Heating Tune-Up (80% Furnaces) (.5 hour)
- How to Professionally Approach a Customer (.5 hour)
- HVAC Essentials - An Introduction to AC Equipment (.5 hour)
- Metering Devices (.5 hour)
- Meters and Measurements (.5 hour)
- Quality Installation Air Distribution (1 hour)
- Quality Installation Gas Heat 1 (1.5 hours)
- Quality Installation Refrigeration 1 (1 hour)
- Summer Pre-Season Maintenance (.5 hour)

- Technician Safety on the Jobsite (.5 hour)
- Testing and Troubleshooting Furnace Pressure Switches (1 hour)
- The Combustion Process (.5 hour)
- The Refrigeration Cycle (.5 hour)
- Troubleshooting Duct Systems (.5 hour)
- Troubleshooting Heat Pump Systems (1.5 hours)
- Two-Stage Cooling and Heating System Control (.5 hour)
- Understanding and Troubleshooting Pressure Switches Used on Lennox Furnaces (.5 hour)
- Understanding Psychometrics (.5 hour)
- Understanding the Heat Pump System (.5 hour)
- Using Enthalpy Controls for Efficiency (.5 hour)
- Using Enthalpy Controls for Efficiency (.5 hour)
- Using Manifold Gauges as a Diagnostic Tool (.5 hour)
- Using the Superheat, Subcooling, and Approach Methods (.5 hour)
- Winter Pre-Season Maintenance Part 2 (.5 hour)

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



**RETRAINEE - JOB CREATION**

**Training Proposal for:**

**Walter Anderson Plumbing Inc. dba Anderson Plumbing Heating and Air Conditioning, Inc.**

**Agreement Number: ET19-0247**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** San Diego

**Analyst:** H. Bernard

**PROJECT PROFILE**

Contract Attributes:	Priority Rate Retrainee Job Creation Initiative Veterans	Industry Sector(s):	Construction Services  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Diego	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: 200	U.S.: 200	Worldwide: 200
<u>Turnover Rate:</u>	15%		
<u>Managers/Supervisors:</u> (% of total trainees)	3%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$696,800		\$0	\$0		\$696,800

<b>In-Kind Contribution:</b>	<b>100% of Total ETP Funding Required</b>	<b>\$753,700</b>
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills Commercial Skills Computer Skills Cont. Imprv. Mgmt. Skills Haz Mat PL – Commercial Skills	180	8-200	0	\$2,600	\$17.03
				Weighted Avg: 100			
2	Retrainee Job Creation Initiative	Business Skills Commercial Skills Computer Skills Cont. Imprv. Mgmt. Skills Haz Mat PL – Commercial Skills	30	8-200	0	\$4,160	*\$14.19
				Weighted Avg: 160			
3	Retrainee Job Creation Initiative Veteran	Business Skills Commercial Skills Computer Skills Cont. Imprv. Mgmt. Skills Haz Mat PL – Commercial Skills	25	8-200	0	\$4,160	*\$14.19
				Weighted Avg: 160			

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

**Minimum Wage by County:** Job Number 1 – San Diego County - \$17.03/hr.; Job Numbers 2 & 3 - \$14.19/hr.

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

**Used to meet the Post-Retention Wage?:**  Yes  No  Maybe  
Up to \$1.03 per hour in Job Number 1 and up to \$1.69 per hour in Job Numbers 2 & 3 may be used to meet the Post-Retention Wage

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Technicians		115
Administrative Staff		20

Sales Staff		10
Technician Installer/Delivery Staff		30
Supervisors		2
<b>Job Number 2 – Job Creation</b>		
Technicians/Maintenance Technicians		20
Administrative Staff		2
Sales Staff		2
Technician Installer/Delivery Staff		5
Supervisors		1
<b>Job Number 3 – Veteran – Job Creation</b>		
Technicians/Maintenance Technicians		17
Sales Staff		3
Technician Installer/Delivery Staff		4
Supervisors		1

## **INTRODUCTION**

Walter Anderson Plumbing, Inc. dba Anderson Plumbing Heating And Air Conditioning, Inc. ([www.andersonpha.com](http://www.andersonpha.com))(Anderson PHA), founded in 1978 and headquartered in El Cajon, installs, repairs and services HVAC systems and plumbing to residential homes in San Diego, Imperial, Orange and Riverside counties. This will be Anderson PHA’s second ETP Agreement, its second in the last five years.

In its first project, Anderson PHA focused on training its staff in Business Skills to facilitate improved communication, customer service and team work. It also focused on Communication Skills, Computer Skills and Commercial Skills. Moving forward, this new project will focus highly on commercial skills for staff including new technologies, new product lines and skills upgrades for lower skilled staff. Trainees will not receive duplicative training provided in the last ETP project.

### **Veterans Program**

Anderson PHA has developed a recruitment campaign specifically aimed at attracting Veterans. The Company collaborates with “Troops to Trades” and “Women Warriors in the Trades”, local organizations that aid in placing local veterans into jobs. In the San Diego area, a large military and veteran population exists. As part of Job Creation, Anderson PHA plans to hire 25 Veterans as net new hires during this project (Job Number 3). The Veteran reimbursement rate of \$26 per hour for training in California applies here.

## **PROJECT DETAILS**

Currently, Anderson PHA is expanding, adding 70 new jobs since 2015 and the Company expects the same continued growth over the next two years. This is driven by expanding markets. In order to keep up with customer demand, Anderson PHA is continually implementing new industry technologies, creating new positions and adding new business segments to its current service offerings. This will include a new Maintenance Technician position. These new staff will perform basic maintenance tasks for customers, mitigating the need to send an experienced, highly skilled technician out for a simple job, reducing costs for the Company and consumers. Anderson PHA

will utilize lower skilled individuals to fill these Maintenance Technician positions, training them in short, intensive training programs. Adding these technicians frees up the more skilled technicians (HVAC, Plumbing) to focus on more complex jobs where their skills are better utilized. Once Maintenance Technicians are able to successfully perform their job functions, these staff will have the opportunity to receive additional training hours and advance up the technician career ladder to become Plumbing or HVAC Technicians.

In addition, Anderson PHA will be expanding its plumbing offerings to include a new technology of drain and pipe lining/sleeving and a new repair system, Cured in Place Pipe (CIPP). These new product offerings create cost-effective and faster solutions for pipe and drain repairs. New equipment for the plumbing department has been purchased, costing approximately \$100,000, including underground cameras and trucks that will assist in the new plumbing offerings and will require training for all plumbing staff.

Further, Anderson PHA plans to add residential electrical services in early 2019. This new offering will enable the Company to provide electrical service, fan and outlet installations and support electrical upgrades on the HVAC installations. This allows the Company to offer all HVAC, plumbing and electrical needs in a one-stop shop. This will required that newly hired electrical staff are trained on commercial skills as well as communication, sales, and conflict resolution.

Alongside the new products and service offerings, the Company is constantly required to train in state regulations, including regulatory changes to California building code (Title 24) which include the implementation of "smart" cooling, ventilations and duct systems. Title 24 requires constant changes to equipment as technology is updated to increase energy efficiencies in the industry. This has been a significant and ongoing training need for all staff as the industry is constantly changing.

Anderson PHA has an extensive training plan in place for newly hired and incumbent staff. The Company hires new staff that have no experience in the industry who must be fully trained in order to ensure competency on the job. Newly hired Technicians may receive daily training for the first 6 months of employment and over 600 hours of training annually. Incumbent Technicians may receive up to 260 hours of training annually in order to keep up with changing technologies in product and service offerings, as well as necessary training relating to Title 24. Further, with the addition of the electrical services in 2019, Anderson PHA expects to train Electricians up to 600 hours during the first year on the job to ensure that these staff are fully trained in residential and HVAC equipment. Finally, the Company's Sales and Administrative staff must be trained on product knowledge, technology updates, customer service, sales and computer skills to successfully perform their job duties. In its previous ETP Agreement, incumbent trainees received an average of 108 training hours, and Job Creation/Veterans received an average of 118 training hours, with 53 Technicians receiving 200 hours of training.

### **Green/Clean Operations**

Anderson PHA is involved in both Green and Clean Operations as it installs green/clean HVAC systems within residential spaces required within Title 24. The Company also utilizes nanotechnology in the use of Nano-air which harnesses nano particles instead of utilizing cooling agents like fluorocarbons, cutting a carbon footprint by 50% and toxic CO2 emissions by 57%.

### **Retrainee - Job Creation**

Due to expansion of business capacity through new service lines, Anderson PHA plans to create 60 new jobs, of which 55 are included in this project. Of the 55 net new hires, 40 of these will be new Maintenance Technicians, 10 will be included on the new Electrical Team and the others will be from the plumbing team. Inclusive of the 55, Job 3 will include 25 Veterans. The Panel offers

incentives to companies that commit to hiring new employees. Training for newly-hired employees will be subject to a lower post-retention wage.

The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract in Jobs 2 & 3. These trainees will be hired into "net new jobs" as a condition of contract.

## **Training Plan**

Training will be provided at the Company's El Cajon headquarters and at customer locations in a Classroom/Laboratory, and Productive Lab (PL) setting. The following are some of the curriculum topics included in the Menu Curriculum, Exhibit B of the proposed agreement.

**Business Skills:** Communication Skills, Negotiation Skills, Presentation Skills, Conflict Resolution, Negotiation Skills.

**Commercial Skills:** Thermal Dynamics, Advanced AC Systems, Motors, Digital Tools, Ventilation Systems, Fundamentals of HVAC Systems, Water Heaters, Valves, Drains, Water Supply Treatment Systems.

**Computer Skills:** Successware, Tablet Applications, Trenchless Video X-Ray, Water Leak Video Inspection Tools.

**Continuous Improvement:** Leadership Skills, Root Cause Analysis, Quality Control/Systems, Lean Production.

**Management Skills:** Coaching, Business Acumen, Building High Performance Teams.

**Hazardous Materials:** Field Service Technicians and Sales Staff will receive training in Hazardous Waste/Materials to ensure appropriate response to hazardous waste spills on the worksite or in transit. This training is highly technical and meets all industry and OSHA governmental standards. No specific number of hours has been determined and no certificate will be received at the completion of training.

## **Productive Laboratory**

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

Anderson PHA finds that on-the-job training is a critical element to the Company's extensive training program and provides up to 2,200 hours of on-the-job training for its newly hired technicians over a two year period. This training methodology allows the company to provide hands-on experience in the field with a master trained technician. Workers are trained on-site in diagnostics, installation, repair systems planning and code compliance under ETP PL guideline requirements. Anderson PHA expects that production time will be greatly reduced during PL training as the trainer is not able to perform their job duties as their will be 100% spent on training and the Company expects production to be reduced by at least 30%. Approximately 130 technicians will receive PL.

Anderson PHA is requesting a trainer to trainee ratio of 1:3 for PL, but expects that most training will be in a 1:1 or 1:2 setting. In some cases, trainees will be in groups of 2 or 3 trainees because they work in teams on the job installing or repairing HVAC systems. Training these small teams during PL is a necessity based on the way work is actually performed at customer sites.

## **Commitment to Training**

Anderson PHA's annual training budget is \$750,000. The Company documented over 21,325 of training hours in the last ETP Agreement. The Company employs six full time trainers and will add two additional trainers specialized in electrical to meet future training needs. In addition, during peak training season, the Company may deploy four additional internal trainers to assist in the delivery of critical training. Training will begin immediately upon project approval.

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

### ➤ Training Infrastructure

The project will be overseen by the Company's President, with administrative support by the Human Resources Manager and the Human Resources Assistant. Anderson PHA also employed Synergy Management Consultants to assist with the administration of the project. In-house and external trainers will provide training.

## **RECOMMENDATION**

Staff recommends approval of this proposal.

## **PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET17-0104	San Diego	7/1/16 – 6/30/18	\$375,120	\$375,120 (100%)

## **DEVELOPMENT SERVICES**

Anderson PHA retained Synergy Management Consultants to assist with development of this proposal for a flat fee of \$30,000.

## **ADMINISTRATIVE SERVICES**

Anderson PHA retained Synergy Management Consultants in Grass Valley to perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

## **TRAINING VENDORS**

Heat Exchanger Expert of Sacramento has been retained to provide training for a fee of \$12,000. Other trainers will be identified for ETP record-keeping purposes, as they are retained by Anderson PHA.

## **Exhibit B: Menu Curriculum**

### **Class/Lab Hours**

8-200 Trainees may receive any of the following:

#### **BUSINESS SKILLS**

- Persuasion Strategies
- Intra-company communication/ Advanced communication
- Negotiation Skills
- Conflict Resolution
- Customer Needs Assessment
- Presentation Skills
- Active listening skills
- Communication skills
- Managing expectations

#### **COMMERCIAL SKILLS**

- Thermal Dynamics
- Switches and electrical components
- Smart Home Systems/ controls
- Heat Exchanger Systems
- System Sizing/ planning design
- Advanced A/C systems
- Advanced diagnosis
- Metering devices
- Motors
- Digital Tools
- Advanced Wiring and Schematics
- Thermostats
- Maintenance Tune up procedures
- Field tools/ gauges
- Digital tools Gauges
- Air Quality diagnostics and methodologies
- Inverter Technology
- Ventilation systems
- Barriers methodologies
- Fundamentals of HVAC Systems
- Fundamentals of air movement efficiency
- Insulating methodologies

#### **Plumbing**

- Plumbing Safety
- Basic tools
- Fundamentals of Water flow and Plumbing systems
- Maintenance of fixtures drains and water heaters
- Pipes and fittings including install
- Compression Fittings
- Fixtures and Faucets including install
- Disposals

- Drains- roof/ floor and area
- Valves
- Water Heaters
- On Demand hot water systems
- Pipes and supply lines
- Sleeving process
- Gas and fuel systems
- Back flow systems
- Sewage and pump systems
- Venting
- Water pressure booster and recirc systems
- Water supply treatment systems
- Diagnostics
- Septic systems maintenance
- Video Inspection
- Trenchless systems and tooling
- Plumbing Code

### **Electrical**

- Electrical Fundamentals
- Electrical Safety and Tools
- Reading electrical drawings, fixture schematics
- Electrical components and devices
- Lighting
- Wiring- conduits, cables and connectors
- Residential electrical systems
- High voltage/ low voltage systems
- Trouble shooting electrical systems/ components
- Wiring HVAC systems

### **COMPUTER SKILLS**

- Successware skills
- Regulatory Code research techniques
- Tablet applications for field sales/ invoicing/diagnostics
- Trenchless Video x-Ray
- Water leak video inspection tools

### **CONTINUOUS IMPROVEMENT**

- Leadership skills
- Team Building
- Root cause Analysis
- Quality control/systems
- Logistics efficiency
- Decision Making Skills
- Lean Production

### **MANAGEMENT SKILLS**

- Coaching For leaders
- Business Acumen Skills
- Motivating Employees

- Building High Performance Teams

**HAZARDOUS MATERIALS**

- Coolant systems- evac and weigh in procedures
- HAZ mat safety
- Asbestos procedures/ handling

**Productive Lab Hours**

0-60

**COMMERCIAL SKILLS**

- HVAC
- Thermal Dynamics
- Switches and Electrical Components
- Heat Exchanger Systems
- Air Conditioning Systems
- Metering Devices
- System Controls/Smart System Controls
- Motors
- Whole House Fans
- Inverter-type Systems
- Digital Tools
- Wiring
- Thermostats

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

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





**Training Proposal for:  
A. Teichert & Son, Inc.**

**Agreement Number: ET19-0243**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** Sacramento

**Analyst:** K. Jones

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate Veterans SET HUA	Industry Sector(s):	Construction  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Alameda, El Dorado, Fresno, Merced, Nevada, Placer, Sacramento, San Bernardino, San Joaquin, Stanislaus, Sutter, Tulare, Yolo, Yuba	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Operating Engineers Local 3; Construction and General Laborers' Local 185		
Number of Employees in:	CA: 2,309	U.S.: 2,387	Worldwide: 2,387
Turnover Rate:	4%		
Managers/Supervisors: (% of total trainees)	N/A		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$694,980		\$0	\$0		\$694,980

In-Kind Contribution:	100% of Total ETP Funding Required	\$950,000
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET Priority Rate	Computer Skills, Continuous Improvement, Commercial Skills	810	8-200	0	\$858	\$22.77
				Weighted Avg: 33			

**Minimum Wage by County:** SET/Priority Industry: \$22.77 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 \$2.50 per hour may be used to meet the Post-Retention Wage for Job Number 1.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Administrative Support Staff		39
Administrator		127
Engineer		95
Estimator		41
Foreman		155
Lead		66
Office Assistant		42
Project Manager		94
Quality Assurance Staff		45
Sales and Service Staff		12
Technician		94

**INTRODUCTION**

Founded in 1887 and headquartered in Sacramento, A. Teichert & Son, Inc. (Teichert) ([www.teichert.com](http://www.teichert.com)) is a construction company that builds infrastructure such as freeways, commercial and industrial site work, parks, and airports. Services include grading, asphalt paving, concrete curbs and sidewalks, underground pipelines and joint utility installations. Additionally, Teichert produces construction materials such as aggregate rocks, sand, gravel, asphaltic concrete and ready-mixed concrete. Training will be conducted at Teichert’s facilities in Alameda, El Dorado, Fresno, Merced, Nevada, Placer, Sacramento, San Joaquin, San Bernardino, Stanislaus, Sutter, Tulare, Yolo and Yuba counties, all of which will participate in the training proposal.

The Foremen and Lead workers are represented by two local unions: Operating Engineers Local 3 and Construction and General Laborers' Local 185. These unions have submitted letters of support for the training of their respective members.

## **Veterans**

Teichert has a special recruiting and outreach program for Veterans and active duty personnel undergoing pre-separation counseling. In particular, the company seeks Veterans who acquired Military Occupational Specialties (MOS) in the engineering and construction fields. The 25 Veterans are represented in Job Number 1. All of the training in Job Number 1 consists of vocational skills training.

## **PROJECT DETAILS**

This proposal is the fourth Agreement between Teichert and ETP, the third in the last five years. In Teichert's first ETP Agreement, the Company focused on improving efficiency, precision and overall productivity of its administrative and operational activities. In its second ETP Agreement, Teichert focused on upgrading internal business networks by enhancing its Enterprise Resource Planning (ERP) system to a Viewpoint system to better manage the business. In the last Agreement, training focused on increasing the Company's client base in multiple areas of California while facing competition from low-wage, non-union companies. This proposal may include employees who participated in previous Agreements and some curriculum topics are repeated; however, course content has been updated and training will not be duplicated.

This Agreement will focus on Teichert's newly developed Teichert University Unit. Teichert University has been designed to bring uniformity to Teichert's 35 locations throughout California. In the past, training varied from location to location and there was little consistency in construction processes and practices. Teichert University will develop curriculums and provide training to all locations to ensure staff learn to complete construction projects uniformly throughout each location. Teichert University will tailor training plans for staff based on experience level and occupation.

Teichert is also expanding its training efforts by including six locations that did not participate in previous ETP training Agreements. Teichert is expanding their training initiative to include staff located in Merced, San Bernardino, Stanislaus and Tulare counties. Training will enhance leadership techniques and increase knowledge of project management. Courses include Role of the Lead, Project Management, and Scheduling Survival Skills.

In Addition, training on construction and business best practices will continue to be provided, and build upon courses offered under previous ETP Agreements. Training topics include Contracts/Bonds/Credit/Risk, Operational Excellence, and Hydro Excavation.

## **Training Plan**

Training will be provided using the Class/Lab delivery method by in-house experts and vendors as needed in the following:

**Commercial Skills:** Training will be offered to all occupations to increase knowledge of construction and business practices. Training topics include Introduction to Public Works, Inspection and Integrity Management, Reading Grade Stakes, Repair/Replacement, Storm Water Plans, and Pipeline Valve Automation.

**Computer Skills:** Training on the Enterprise Resource Planning System (ERP), Document Management Software, Equipment Management Software, and Project Management Computer Systems will be offered to all occupations. Training will provide the skills to utilize the internal software necessary to perform job functions.

**Continuous Improvement:** Training will be offered to all occupations, and focus on leadership and project management skills. Training topics include Role of the Foreman, Project Management, Leading Others, Financial Systems and Motivating Others.

### **Commitment to Training**

Teichert spends \$950,000 per year on training for all 35 California locations. The Company provides the following training: new hire orientation, safety training, California labor laws and regulations, basic computer skills, violence in the workplace prevention, and sexual harassment prevention. 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

Each facility has a manager responsible for roster collection, coordination of training, and training performance. These managers will report training progress to the Human Resources Manager at the lead facility in Sacramento. Training will be provided by the trainers of the Teichert University Unit and vendors to be determined. The Company has also hired a third party administrator, Steve Duscha Advisories, to assist with ETP administrative requirements.

### **High Unemployment Area**

In Job Number 1, 50 trainees work in a High Unemployment Area (HUA), a region with unemployment exceeding the state average by at least 25%. The Company's locations in Fresno, Merced, San Joaquin, Stanislaus, Sutter, Tulare and Yuba counties qualify for HUA status under these standards. However, Teichert is not requesting a wage modification.

### **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.

For trainees employed in a priority industry, the Panel may modify the wage up to 25% below the statewide average hourly wage (from \$30.36 to \$22.77). Teichert requests this modification.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

**ACTIVE PROJECTS**

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
*ET17-0346	\$355,680	12/26/2016 - 12/25/2018	470	0	0

\*Based on ETP Systems, 22,001 reimbursable hours have been tracked for potential earnings of \$396,018 (100% of approved amount). The Contractor projects final earnings of 100% based on training hours currently uploaded to the ETP Online Tracking Site.

**PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0108	Sacramento	08/03/2015 - 08/02/2017	\$329,076	\$329,076 (100%)

**DEVELOPMENT SERVICES**

Steve Duscha Advisories of Sacramento assisted with development for a flat fee of \$15,000.

**ADMINISTRATIVE SERVICES**

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

**TRAINING VENDORS**

To Be Determined

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

8-200

Trainees may receive any of the following:

**COMMERCIAL SKILLS**

- Building the Work—Overlay
- Building the Work—Site Job
- Building the Work—Subdivision
- Casing Removal
- Coating Removal & Installation
- Compressor and Reg Stations
- Dewatering
- Dig-In Prevention
- Estimating
- Excavation
- Gas Distribution Lines (Fusion Welded Plastic)
- Horizontal Directional Drilling (HDD)
- Hydro Excavation
- Hydrostatic Testing
- In-Line Inspection
- Inspection and Integrity Management
- Introduction to Concrete
- Introduction to Earthwork
- Introduction to Mobile Equipment and Small Tools
- Introduction to Paving
- Introduction to Private Work
- Introduction to Public Works
- Operator Qualification Training for PG&E Pipeline Work
- Pipeline Construction Management
- Pipeline Engineering
- Pipeline Maintenance Management
- Pipeline Valve Automation
- Plan Reading
- Primary/Secondary Electrical Conduit
- Reading Grade Stakes
- Repair/Replacement
- Scheduling
- Scheduling Survival Skills
- Shoring
- Storm Water Plans
- Telecom and Cable Conduits
- Trenching
- Underground Work

**COMPUTER SKILLS**

- Accounts Payable Software
- Accounts Receivable Software
- Document Management Software
- Enterprise Resource Planning System (ERP)

- Equipment Management Software
- Project Management Computer Systems

**CONTINUOUS IMPROVEMENT**

- Adapting to Change
- Coaching & Giving/Receiving Feedback
- Communicating Effectively
- Contracts/Bonds/Credit/Risk
- Creating & Building Teamwork
- Dealing with Conflict/Difficult Attitudes
- Decision Making
- Finance 101
- Financial Systems
- Leading Others
- Motivating Others
- Operational Excellence
- Project Management
- Role of the Foreman
- Role of the Lead
- Team Problem Solving

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



# OPERATING ENGINEERS LOCAL UNION No. 3

3920 LENNANE DRIVE, SACRAMENTO, CA 95834 • (916) 993-2055 • FAX (916) 419-3491

Jurisdiction: Northern California, Northern Nevada, Utah, Hawaii, and the Mid-Pacific Islands

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August 16, 2018

RE: Teichert Construction's Foreman Leadership Training

To Whom It May Concern:

We support Teichert Construction's efforts to provide annual Foreman Leadership training to Teichert employees who are members of the Operating Engineers Local Union No. 3.

If you should have any questions, please do not hesitate to call me at 916.993.2055.

Fraternally,

Rob Carrion  
District Representative  
Operating Engineers Local Union No. 3  
Sacramento District 80 Office

RC:ap  
iuoe-3d-afl-cio





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## CONSTRUCTION AND GENERAL LABORERS' LOCAL 185

*Affiliated with Laborers' International Union North America*

**DOYLE S. RADFORD, SR.**  
Business Manager

**Armando Calzada**  
Secretary Treasurer

Juan McKnight  
*President*

Doyle S. Radford, Jr.  
*Vice-President*

Armando "AC" Covarrubias  
*Recording Secretary*

John Flem  
*Executive Board*

Gary Sharette  
*Executive Board*

John Vance  
*Auditor*

Ivan Rabb  
*Auditor*

Jeremy Jimenez  
*Auditor*

Lionel Barragan  
*Sergeant-at-Arms*

August 22, 2018

RE: Teichert's Foreman Leadership Training

To Whom It May Concern:

We support Teichert Construction's efforts to provide annual Foreman Leadership training to Teichert employees who are members of the Laborers Union.

If you should have any questions, please don't hesitate to call.

Sincerely,

Doyle S. Radford  
Business Manager

DSR:sb



**RETRAINEE - JOB CREATION**

**Training Proposal for:**

**Bay Alarm Company**

**Agreement Number: ET19-0242**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** Sacramento

**Analyst:** C. Kaiser

**PROJECT PROFILE**

Contract Attributes:	HUA Priority Rate Retrainee SET Job Creation Initiative	Industry Sector(s):	Construction Services  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
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		
Number of Employees in:	CA: 1,021	U.S.: 1,021	Worldwide: 1,021
<u>Turnover Rate:</u>	6%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$739,700		\$0	\$0		\$739,700

In-Kind Contribution:	100% of Total ETP Funding Required	\$994,809
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate SET	Business Skills, Commercial Skills, Computer Skills, Cont. Improv.	140	8-200	0	\$1,040	\$22.77
				Weighted Avg: 40			
2	Retrainee Priority Rate HUA SET	Business Skills, Commercial Skills, Computer Skills, Cont. Improv.	40	8-200	0	\$1,040	*\$12.53
				Weighted Avg: 40			
3	Priority Rate Job Creation SET	Business Skills, Commercial Skills, Computer Skills, Cont. Improv.	140	8-200	0	\$3,250	*\$13.66
				Weighted Avg: 125			
4	Priority Rate Job Creation HUA SET	Business Skills, Commercial Skills, Computer Skills, Cont. Improv.	30	8-200	0	\$3,250	*\$11.00
				Weighted Avg: 125			

\*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:** \$22.77 per hour for Alameda, Contra Costa, Los Angeles, Orange, Sacramento, San Bernardino, San Diego, San Mateo, Santa Clara, Sonoma, Ventura Counties. **Job Number 2:** \$12.53 per hour for San Joaquin and Shasta Counties. **Job Number 3:** \$15.18 per hour for Alameda, Contra Costa, San Mateo, Santa Clara Counties; \$14.62 per hour for Los Angeles County; \$14.58 per hour for Orange County; \$14.00 per hour for Sacramento County; \$14.19 per hour for San Diego County; \$13.66 per hour for San Bernardino, Sonoma, Ventura Counties. **Job Number 4:** \$11.00 per hour for San Joaquin and Shasta Counties.

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

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

Up to \$1.48 per hour may be used to meet the Post-Retention Wage for Job Number 1 and \$0.66 per hour for Job Number 3.

Commissions have ranged from \$.02 to \$63.49 per hour over the past 12 months, with the average hourly commission being \$13.55. Commissions may be used by Sales Staff to meet the post-retention wage requirements in Job Number 1.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1:</b>		
Customer Service Staff		4
Installer/Dispatcher Staff		36

Monitoring Staff		18
Operations Staff		20
Sales Staff		36
Service Technicians		26
<b>Job Number 2:</b>		
Customer Service Staff		2
Installer/Dispatcher Staff		10
Monitoring Staff		5
Operations Staff		6
Sales Staff		10
Service Technicians		7
<b>Job Number 3:</b>		
Customer Service Staff		1
Installer/Dispatcher Staff		34
Monitoring Staff		20
Operations Staff		17
Sales Staff		40
Service Technicians		28
<b>Job Number 4:</b>		
Customer Service Staff		1
Installer/Dispatcher Staff		10
Monitoring Staff		2
Operations Staff		8
Sales Staff		5
Service Technicians		4

## **INTRODUCTION**

Founded in 1946 and headquartered in Concord, Bay Alarm Company (Bay Alarm) a subsidiary of BALCO Holdings, Inc., ([www.bayalarm.com](http://www.bayalarm.com)) 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.

Training will take place at Bay Alarm facilities in Alameda, Contra Costa, Los Angeles, Orange, Sacramento, San Bernardino, San Diego, San Joaquin, San Mateo, Santa Clara, Shasta, Sonoma, and Ventura counties.

## **PROJECT DETAILS**

This is Bay Alarm's sixth ETP Agreement, the third within the last five years. In the last Agreement, training focused on the Company's new software system, Digital Watchdog Vmax IP+. For this Agreement, training will focus on integrating systems and implementing others. Bay Alarm plans

to integrate its Digital Monitoring Products with its Digital Watchdog software system. This provides the dispatchers live data, enabling technicians to respond faster. This integration requires extensive training for Installer/Dispatcher Staff and Service Technicians. Some curriculum topics are repeated from the previous agreements; however, the subject matter has been updated and improved per new technology and developments so there will be no duplication of training content in those courses.

Bay Alarm is also implementing new Residential Platform Panel and Ubiquity wireless camera technology which will allow for clearer images and faster feedback to the customer and Bay Alarm staff. Both require extensive training for all occupations.

Furthermore, the Company is providing training to its Monitoring Staff not included in prior Contracts. This department is responsible for monitoring current client services including service setup, scheduling appointments, calling for emergency services, and taking homeowner calls. Extensive training will be delivered on the monitoring and security software and Bay Alarm systems as well as customer service skills to ensure quality and accuracy.

### **Retrainee - Job Creation**

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

Due to Bay Alarm's 9% growth in the last year and a projection of 6% to 8% growth over the next 2 years, the Company has committed to hiring 170 new employees (Job Numbers 3 & 4). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

### **Training Plan**

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

**Business Skills:** Training will be offered to all occupations. Courses include Advanced Sales Skills and Residential and Commercial Systems/Applications Protocols. Training will teach trainees about all the systems Bay Alarm offers and to begin mastery of sales and marketing techniques.

**Commercial Skills:** Training will be offered to all occupations. Courses include DMP Digital Watchdog Integration and lyric System Skills. Each department will receive training to accurately use the devices and software.

**Computer Skills:** Training will be offered to all occupations. Courses include ADP System Skills and Alarm and Computer System Procedures. Training will focus on the proper use of Company's software.

**Continuous Improvement:** Training will be offered to all occupations. Courses include Leadership Development and Process & Quality Improvement. Trainees will receive training on support, communication and teamwork.

### **Commitment to Training**

Bay Alarm's annual training budget is approximately \$1.5 million and is spent on basic job skill training, new employee orientation and on boarding, driver safety, ergonomics, fire code training, and basic OSHA 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

Bay Alarm has appointed its Training Administrator for ETP training at its Headquarters in Concord. This individual is responsible for the scheduling and tracking all training; meeting with ETP staff; overall record keeping. Bay Alarm has two other staff members and a point-of-contact at each location charged with coordinating training among facilities. In addition to the assigned staff members, Bay Alarm has also retained the services of a third-party administrator with extensive ETP experience to assist with administration.

**Commission**

Bay Alarm has a formal Commission Plan for Sales Staff. Commissions are calculated and paid twice monthly. Bay Alarm requests to use commission to meet the Post-Retention wage of \$22.77 for the occupational title of Sales Staff in Job Number 1. Commission for this occupation is based on a percentage of services rendered and sold as well as company profits.

**SET/High Unemployment Area (HUA)**

Under Special Employment Training (SET) companies are 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.

Job Numbers 2 and 4 trainees work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%. The Company’s locations in Shasta and San Joaquin counties qualify for HUA status. These HUA trainees qualify for the ETP Minimum Wage rather than the statewide average hourly wage. Bay Alarm is requesting a wage modification for the 40 trainees in Job Number 2 and 30 trainees in Job Number 4.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**ACTIVE PROJECTS**

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0190	\$689,400	9/6/16 – 9/5/18	305	29	0

Based on ETP Systems, 34,800 reimbursable hours have been tracked for potential earnings of \$689,400 (100% of approved amount). The Contractor projects final earnings of 100% based on current and in progress training through September 5, 2018.

**PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0185	Multiple	07/07/14 – 07/06/16	\$425,404	\$425,404 (100%)
ET12-0178	Multiple	11/21/11 – 11/20/13	\$222,750	\$208,773 (94%)

**DEVELOPMENT SERVICES**

Training Funding Partners in Fountain Valley assisted with development of this proposal for a flat fee of \$17,500.

**ADMINISTRATIVE SERVICES**

Training Funding Partners will also perform administrative services in connection with this proposal for a fee not to exceed 7% 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**

- Advanced Sales Skills
- Business Processes/Procedures
- Customer Service/Dispatch Procedures
- Equipment/Industry Overview
- New/Updated Products and Services
- Residential and Commercial Systems/Applications Protocols

**COMMERCIAL SKILLS**

- Alarm/Fire Monitoring Skills
- Digital Watchdog Technology
- DMP (Digital Monitoring Products) Digital Watchdog Integration
- Enhanced Industry Skills
- Enhanced Security Equipment
- Lyric System Skills
- Next Generation Cellular Communications
- Product Installation/Service/Troubleshooting Skills
- Wireless Cameras

**COMPUTER SKILLS**

- ADP System Skills
- Advanced Microsoft Office Skills
- Alarm and Computer System Procedures
- Bay Alarm Proprietary Software System Skills

**CONTINUOUS IMPROVEMENT**

- Leadership Development
- Problem Solving/Decision Making
- Process & Quality Improvement
- Team Effectiveness/Collaboration

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





**Training Proposal for:**  
**Glendale Community College**  
**Professional Development Center**

**Agreement Number: ET19-0266**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** M. Paccereilli

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate Veterans SB<100	Industry Sector(s):	Manufacturing Aerospace and Defense Warehousing Transportation/Logistics Services Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles; Orange; Riverside; San Bernardino; San Diego; Ventura; Kern	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**

<b>Program Costs</b>	+	<b>Support Costs</b>	=	<b>Total ETP Funding</b>
\$1,646,872		\$114,000 8%		\$1,760,872

<b>In-Kind Contribution:</b>	<b>50% of Total ETP Funding Required</b>	<b>\$1,472,000</b>
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee	Computer Skills, Cont. Improvement	84	8-200	0	\$1,377	\$16.70
				Weighted Avg: 56			
2	Retrainee Priority Rate	Computer Skills, Cont. Improvement	598	8-200	0	\$1,529	\$16.70
				Weighted Avg: 55			
3	Retrainee Veterans Priority Rate	Computer Skills, Cont. Improvement	151	8-200	0	\$1,529	\$16.70
				Weighted Avg: 55			
4	Retrainee SB<100 Priority Rate	Computer Skills, Cont. Improvement	327	8-200	0	\$1,529	\$16.70
				Weighted Avg: 55			

**Minimum Hourly Wage by County:** \$17.54 for Los Angeles County; \$17.50 for Orange County; \$17.03 for San Diego County; and \$16.70 for Ventura, Riverside, Kern and San Bernardino Counties.

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

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

Participating employers may use up to \$2.50 per hour in health benefits to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Manufacturing/Production Staff		552
Warehouse/Distribution Staff		56
Engineering Staff		235
Technician/Information Technology Staff		115
Quality Assurance Staff		100
Customer Success Staff		42
Supervisor/Manager		40
Owner (Job 4 only)		20

## **INTRODUCTION**

Founded in 1927, Glendale Community College Professional Development Center (GCC) ([www.pdcfgcc.com](http://www.pdcfgcc.com)) provides customized, job-specific training for businesses and workers through its Professional Development Center.

This will be GCC's 40th ETP Agreement, the seventh within the last five years. GCC has trained more than 37,000 workers from 5,000 Southern California employers of which 82% were small business employers and 90% were Panel-recognized priority industries.

In this proposal, participating employers qualify as priority industries in manufacturing, aerospace, warehousing, transportation/logistics and other companies facing out-of-state competition. These employers have expressed a need for training because they are struggling to keep up with technology and competitors. These employers have also expressed the need to build employees' skills to work in a continuously changing environment. Many are investing in automated systems and software packages to increase productivity, efficiency, and accuracy. Some employers are reorganizing operations to meet procurement, development and technology changes.

## **PROJECT DETAILS**

Training will assist manufacturing companies facing fierce out-of-state competition train their workers. The "core" group of employers represents 76% of the requested funding.

### **Training Plan**

**Continuous Improvement:** Training will provide all occupations for improvement in daily processes, while working more efficiently to reduce errors and reduce operating costs. The training modules include Lean Operations, Shop Math & Blueprint Reading, Geometric Dimensioning & Tolerancing, Six Sigma, Planning, Purchasing and Inventory Management.

**Computer Skills:** Training will offered to all occupations. This training will provide trainees the skills to become more proficient in the use of the most current technology in areas such as MS Project, Computer Numerical Control Programming, SolidWorks, CATIA and MasterCAM.

### **Curriculum Development**

GCC determines participating employers' specific demands for training based on a pre-training structured assessment and screening process. The core curriculum in this proposal has been developed by GCC over the last 33 years with input from members of the Career Technical Education Task Force, Valley Industrial Commerce Association, Economic Alliance of the San Fernando Valley, and Verdugo Workforce Development Board. The curriculum is continually revised according to the demands and feedback of the participating companies. Training is designed through the use of employer assessments and customer feedback. All classes are project-based, while focusing on real world applications.

When applicable, labor organizations are involved in the development of the curriculum and training plans. GCC trainers work closely with the labor representative and the employer to ensure that the training meets the goals and objectives set forth by the union.

## Marketing and Support Costs

To identify specific training needs of the business community, GCC continuously markets their training programs in a variety of ways including personal contact, telephone calls, direct mail, and email announcements to recruit companies.

GCC is member of several organizations including five local Chambers of Commerce, Economic Alliance of the San Fernando Valley, Los Angeles Economic Development Corporation, Society of Manufacturing Engineers, and VICA. GCC also partners with the WDB, Association for Operations Management (APICS), and Small Business Administration to promote ETP funded training for California businesses. Within these large networks of employers, GCC markets the delivery of customized training programs through presentations and forums at local meetings, seminars, and tradeshow. All programs are customized to meet the needs of each participating employer.

GCC is requesting 8% support costs to cover the cost of recruiting additional employers and assessing employer-specific job training requirements. Employer recruitment, including the recruitment of small businesses and assessment activities, will continue throughout the contract term.

## Commitment to Training

Many of the large employers listed in the core group of employers have provided new hire training, anti-harassment, and workplace violence classes to their employees. These employers do not have the expertise to provide the menu curriculum offered by GCC. Most small employers have limited budgets therefore not able to offer the training classes needed for employees to be more productive. GCC programs provide in-depth skill development that employers are not able to provide without this funding and will develop skills that upgrade employee performance so companies can remain competitive. ETP training funds will supplement training that is not currently being provided.

### ➤ Training Infrastructure

GCC's Director will oversee the implementation and administration of this project. There are five full-time staff members dedicated to the administration of the ETP project who are very knowledgeable of the program having participated in administering GCC's prior ETP projects.

Training will be conducted at participating employers' worksites and GCC's Professional Development Center. The PDC is a 10,000 square foot training center equipped with state-of-the-art learning environments and a machining center with Haas lathes, mills, simulators and Coordinate Measuring Machines. It has a newly designed Inspection lab equipment and tools used by industry experts. Center-based programs enable access to training for very small employers and for larger employers who need to train only a handful of employees. For training conducted at the employer sites, a GCC project specialist and trainer interview management and employees, observe work activities and patterns, and make recommendations for specific customized training. These recommendations are discussed with company management and a program tailored to their needs is designed.

All training will be provided by GCC instructors who are qualified to deliver training in their respective industry. These trainers have real world experience and credentials to certify their knowledge and teaching abilities.

**Tuition Reimbursement**

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

**RECOMMENDATION**

Staff recommends approval of this proposal.

**ACTIVE PROJECTS**

The following table summarized performance by GCC under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET18-0123	\$949,555	08/29/17-08/28/19	733	652	402

Based on the ETP Online Systems, 39,028 reimbursable hours have been tracked for potential earnings of \$949,555 (100% of approved amount). All training have been completed and the remaining retentions will be completed by November 2018.

**PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned
ET17-0124	Statewide	07/25/16-07/24/18	\$924,973	\$924,973 (100%)
ET16-0103	Statewide	07/07/15-07/06/17	\$826,153	\$826,153 (100%)
ET15-0224	Statewide	09/02/14-09/01/16	\$648,666	\$648,666 (100%)
ET13-0240	Statewide	06/13/13-06/12/15	\$1,150,115	\$1,137,431 (99%)
ET12-0159	Statewide	11/28/11-11/27/13	\$747,006	\$742,679 (99%)

**DEVELOPMENT SERVICES**

N/A

**ADMINISTRATIVE SERVICES**

N/A

**TRAINING VENDORS**

N/A

## **Exhibit B: Menu Curriculum**

### **Class/Lab Hours**

8-200

Trainees may receive any of the following:

#### **CONTINUOUS IMPROVEMENT**

- APICS: Basics of Supply Chain Management
- APICS: Detailed Scheduling and Planning
- APICS: Execution and Control of Operations
- APICS: Master Planning of Resources
- APICS: Strategic Management of Resources
- Business Writing Building Work Relationships
- Conducting Effective Meetings
- Conflict Resolution
- Customer Service Skills
- Frontline Leadership
- Interpersonal Skills Development
- Interview Skills: Selecting the Right Employee
- Leadership Essentials
- Leadership Skills Development
- Leading a Lean Organization
- Leading a Multi-Generational Environment
- Managing Change
- Managing Conflict Situations
- Marketing and Sales
- Marketing Strategies
- Motivating and Mentoring Employees
- Negotiations Skills
- Performance Management
- Presentation Skills
- Problem Solving
- Project Management Professional
- Purchasing and Sourcing
- Strategic Planning
- Stress Management
- Team Building and Working Collaboratively
- Time Management
- 8 Disciplines Problem Solving
- Internal Quality Management Systems Auditor Training
- Lean Operations
- Lean Six Sigma Black Belt
- Lean Six Sigma Green Belt
- Lean Six Sigma Yellow Belt
- Process Improvement
- Quality Improvement
- Root Cause and Corrective Action

- Statistical Process Control
- Supply Chain Management
- CAD/CAM Advanced Shop Applications
- CMM Application in PC-DMIS Software Level 1
- CMM Application in PC-DMIS Software Level 2
- CNC Lathe and Mill Setup Application Lab
- CNC Programming and Setup with MasterCAM
- Geometric Dimensioning and Tolerancing
- Inspection Techniques
- Manufacturing Operations Logistics
- Shop Math and Blueprint Reading

### **COMPUTER SKILLS**

- AutoCAD
- CATIA
- Cyber Security
- MasterCAM
- Microsoft Office
- PC-DMIS
- QuickBooks
- Social Media Marketing
- SolidWorks
- Vericut

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 Contractor (MEC) Agreements  
(ETP 100B)**

Contractor's Name: Glendale Community College  
Professional Development Center

CCG No.: ET19-0266

Reference No: 18-0748

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Aerospace Dynamics International
Address: 25540 W. Rye Canyon Road
City, State, Zip: Valencia, CA 91355
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 60
Total # of full-time company employees worldwide: 569
Total # of full-time company employees in California: 569
Company: Alarin Aircraft Hinge, Inc.
Address: 6231 Randolph Street
City, State, Zip: Commerce, CA 90040
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 4
Total # of full-time company employees worldwide: 47
Total # of full-time company employees in California: 47
Company: Allen Lund Company Inc.
Address: 4529 Angeles Crest Hwy., #300
City, State, Zip: La Canada, CA 91011
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 1
Total # of full-time company employees worldwide: 433
Total # of full-time company employees in California: 104
Company: Alpha Machinery & Technology Co.
Address: 3233 N. San Fernando Road, Unit 6
City, State, Zip: Los Angeles, CA 90065
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 2
Total # of full-time company employees worldwide: 3
Total # of full-time company employees in California: 3

**Participating Employers in Retrainee  
Multiple Employer Contractor (MEC) Agreements  
(ETP 100B)**

Contractor's Name: Glendale Community College  
Professional Development Center

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: American Precision Technologies Inc.
Address: 1947 First Street
City, State, Zip: San Fernando, CA 91340
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 1
Total # of full-time company employees worldwide: 17
Total # of full-time company employees in California: 17
Company: Arconic
Address: 12975 Bradley Avenue
City, State, Zip: Sylmar, CA 91342
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 1
Total # of full-time company employees worldwide: 41,500
Total # of full-time company employees in California: 2,500
Company: Centerpoint Manufacturing Co.
Address: 2625 N. San Fernando Road
City, State, Zip: Burbank, CA 91504
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 8
Total # of full-time company employees worldwide: 30
Total # of full-time company employees in California: 30
Company: Chapman Leonard Studio Equipment Inc.
Address: 12950 Raymer St.
City, State, Zip: North Hollywood, CA 91605
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 10
Total # of full-time company employees worldwide: 145
Total # of full-time company employees in California: 140

**Participating Employers in Retrainee  
Multiple Employer Contractor (MEC) Agreements  
(ETP 100B)**

Contractor's Name: Glendale Community College  
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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Cosmetic Group USA Inc.
Address: 8430 Tujunga Avenue
City, State, Zip: Sun Valley, CA 91352
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 4
Total # of full-time company employees worldwide: 137
Total # of full-time company employees in California: 137
Company: Crane Aerospace & Electronics
Address: 3000 Winona Avenue
City, State, Zip: Burbank, CA 91504
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 70
Total # of full-time company employees worldwide: 2,470
Total # of full-time company employees in California: 620
Company: Custom Control Sensors LLC
Address: 21111 Plummer St.
City, State, Zip: Chatsworth, CA 91311
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 15
Total # of full-time company employees worldwide: 174
Total # of full-time company employees in California: 174
Company: Datastream IT
Address: 330 N. Brand Blvd., Ste. 210
City, State, Zip: Glendale, CA 91203
Collective Bargaining Agreement(s): N/A
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

**Participating Employers in Retrainee  
Multiple Employer Contractor (MEC) Agreements  
(ETP 100B)**

Contractor's Name: Glendale Community College  
Professional Development Center

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: David Barnes Company
Address: 14701 Keswick Ave.
City, State, Zip: Van Nuys, CA 91405
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 60
Total # of full-time company employees worldwide: 90
Total # of full-time company employees in California: 90
Company: Elite Lighting
Address: 5430 Slauson Ave.
City, State, Zip: Commerce, CA 90040
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 1
Total # of full-time company employees worldwide: 188
Total # of full-time company employees in California: 188
Company: Ensign Bickford Aerospace & Defense Company
Address: 14370 White Sage Road
City, State, Zip: Moorpark, CA 93021
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 20
Total # of full-time company employees worldwide: 1,500
Total # of full-time company employees in California: 140
Company: Esterline Mason
Address: 13955 Balboa Blvd.
City, State, Zip: Sylmar, CA 91342
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 75
Total # of full-time company employees worldwide: 400+
Total # of full-time company employees in California: 400

**Participating Employers in Retrainee  
Multiple Employer Contractor (MEC) Agreements  
(ETP 100B)**

Contractor's Name: Glendale Community College  
Professional Development Center

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: FTG Aerospace Inc.
Address: 20750 Marilla Street
City, State, Zip: Chatsworth, CA 91311
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 10
Total # of full-time company employees worldwide: 58
Total # of full-time company employees in California: 46
Company: Georg Fischer Signet LLC
Address: 3401 Aero Jet Avenue
City, State, Zip: El Monte, CA 91731
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 6
Total # of full-time company employees worldwide: 14,808
Total # of full-time company employees in California: 261
Company: Hanmar LLC
Address: 11411 Bradley Avenue
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: 92
Total # of full-time company employees in California: 92
Company: Honeybee Robotics
Address: 398 W. Washington Blvd., Ste. 200
City, State, Zip: Pasadena, CA 91103
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 1
Total # of full-time company employees worldwide: 115
Total # of full-time company employees in California: 49

**Participating Employers in Retrainee  
Multiple Employer Contractor (MEC) Agreements  
(ETP 100B)**

Contractor's Name: Glendale Community College  
Professional Development Center

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Huntsman Advanced Materials
Address: 5121 San Fernando Road West
City, State, Zip: Los Angeles, CA 90039
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 5
Total # of full-time company employees worldwide: 12,000
Total # of full-time company employees in California: 76
Company: Hydra Electric Company
Address: 3151 Kenwood St.
City, State, Zip: Burbank, CA 91505
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 20
Total # of full-time company employees worldwide: 177
Total # of full-time company employees in California: 177
Company: Hydraulics International Inc.
Address: 20961 Knapp St.
City, State, Zip: Chatsworth, CA 91311
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 40
Total # of full-time company employees worldwide: 380
Total # of full-time company employees in California: 380
Company: KDL Precision Molding
Address: 11381 Bradley Avenue
City, State, Zip: Pacoima, CA 91331
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 20
Total # of full-time company employees worldwide: 58
Total # of full-time company employees in California: 58

**Participating Employers in Retrainee  
Multiple Employer Contractor (MEC) Agreements  
(ETP 100B)**

Contractor's Name: Glendale Community College  
Professional Development Center

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Klune Industries Inc.
Address: 7323 Coldwater Canyon Drive
City, State, Zip: North Hollywood, CA 91605
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 50
Total # of full-time company employees worldwide: 610
Total # of full-time company employees in California: 279
Company: L. A. Gauge Company Inc.
Address: 7440 San Fernando Road
City, State, Zip: Sun Valley, CA 91352
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 10
Total # of full-time company employees worldwide: 75
Total # of full-time company employees in California: 75
Company: Lamsco West Inc.
Address: 29101 The Old Road
City, State, Zip: Valencia, CA 91355
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 3
Total # of full-time company employees worldwide: 125
Total # of full-time company employees in California: 123
Company: Lawrence Equipment
Address: 2034 N. Peck Road
City, State, Zip: El Monte, CA 91733
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 1
Total # of full-time company employees worldwide: 200
Total # of full-time company employees in California: 200

**Participating Employers in Retrainee  
Multiple Employer Contractor (MEC) Agreements  
(ETP 100B)**

Contractor's Name: Glendale Community College  
Professional Development Center

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Limoneira Company
Address: 1141 Cummings Road
City, State, Zip: Santa Paula, CA 93060
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 1
Total # of full-time company employees worldwide: 267
Total # of full-time company employees in California: 215
Company: Meggitt Control Systems (North Hollywood)
Address: 12838 Saticoy Street
City, State, Zip: North Hollywood, CA 91605
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 10
Total # of full-time company employees worldwide: 10,000
Total # of full-time company employees in California: 400
Company: Meggitt Safety Systems Inc.
Address: 1915 Voyager Avenue
City, State, Zip: Simi Valley, CA 93063
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 1
Total # of full-time company employees worldwide: 500
Total # of full-time company employees in California: 500
Company: Meyco Machine and Tool Inc.
Address: 11579 Martens River Circle
City, State, Zip: Fountain Valley, CA 92708
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 1
Total # of full-time company employees worldwide: 38
Total # of full-time company employees in California: 38



**Participating Employers in Retrainee  
Multiple Employer Contractor (MEC) Agreements  
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Contractor's Name: Glendale Community College  
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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Milgard Windows and Doors
Address: 355 E. Easy Street
City, State, Zip: Simi Valley, CA 93063
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 1
Total # of full-time company employees worldwide: 3,000
Total # of full-time company employees in California: 1,492
Company: Mulgrew Aircraft Components Inc.
Address: 1810 S. Shamrock Ave.
City, State, Zip: Monrovia, CA 91016
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 1
Total # of full-time company employees worldwide: 42
Total # of full-time company employees in California: 42
Company: nanoPrecision Products
Address: 411 Coral Cir., #B
City, State, Zip: El Segundo, CA 90245
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 1
Total # of full-time company employees worldwide: 12
Total # of full-time company employees in California: 12
Company: New Hampshire Ball Bearings Inc.
Address: 9700 Independence Ave.
City, State, Zip: Chatsworth, CA 91311
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 10
Total # of full-time company employees worldwide: 350
Total # of full-time company employees in California: 350

**Participating Employers in Retrainee  
Multiple Employer Contractor (MEC) Agreements  
(ETP 100B)**

Contractor's Name: Glendale Community College  
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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Organic Milling Inc./Insperity PEO
Address: 505 W. Allen Ave.
City, State, Zip: San Dimas, CA 91773
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 1
Total # of full-time company employees worldwide: 62
Total # of full-time company employees in California: 62
Company: Pacific Sky Supply Inc.
Address: 8230 San Fernando Road
City, State, Zip: Sun Valley, CA 91352
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 10
Total # of full-time company employees worldwide: 66
Total # of full-time company employees in California: 66
Company: Parsons Services Company
Address: 100 W. Walnut Street
City, State, Zip: Pasadena, CA 91124
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 1
Total # of full-time company employees worldwide: 540
Total # of full-time company employees in California: 140
Company: Performance Design Products LLC
Address: 2300 W. Empire Ave., #600
City, State, Zip: Burbank, CA 91504
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 1
Total # of full-time company employees worldwide: 185
Total # of full-time company employees in California: 110

**Participating Employers in Retrainee  
Multiple Employer Contractor (MEC) Agreements  
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Contractor's Name: Glendale Community College  
Professional Development Center

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Porto's Bakery Burbank Inc.
Address: 3614 W. Magnolia Blvd.
City, State, Zip: Burbank, CA 91505
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 5
Total # of full-time company employees worldwide: 210
Total # of full-time company employees in California: 210
Company: Precision Coil Spring Co.
Address: 10107 Rose Ave., PO Box 5450
City, State, Zip: El Monte, CA 91734
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 4
Total # of full-time company employees worldwide: 85
Total # of full-time company employees in California: 85
Company: Repairtech International Inc.
Address: 16134 Saticoy Street
City, State, Zip: Van Nuys, CA 91406
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 60
Total # of full-time company employees worldwide: 42
Total # of full-time company employees in California: 42
Company: Ricon Corporation A Wabtec Company
Address: 1135 Aviation Place
City, State, Zip: San Fernando, CA 91340
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 5
Total # of full-time company employees worldwide: 139
Total # of full-time company employees in California: 132

**Participating Employers in Retrainee  
Multiple Employer Contractor (MEC) Agreements  
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Contractor's Name: Glendale Community College  
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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Roncelli Plastics Inc.
Address: 330 W. Duarte Road
City, State, Zip: Monrovia, CA 91016
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 50
Total # of full-time company employees worldwide: 107
Total # of full-time company employees in California: 107
Company: RTC Aerospace – Chatsworth Division
Address: 9310 Mason Ave.
City, State, Zip: Chatsworth, CA 91311
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 3
Total # of full-time company employees worldwide: 180
Total # of full-time company employees in California: 180
Company: Schrillo Company
Address: 16750 Schoenborn Street
City, State, Zip: Sepulveda, CA 91343
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 1
Total # of full-time company employees worldwide: 38
Total # of full-time company employees in California: 38
Company: Semco Instruments Inc.
Address: 25700 Rye Canyon Road
City, State, Zip: Valencia, CA 91355
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 1
Total # of full-time company employees worldwide: 67
Total # of full-time company employees in California: 67

**Participating Employers in Retrainee  
Multiple Employer Contractor (MEC) Agreements  
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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Senior Operations Inc. AKA Senior Aerospace/SSP
Address: 2980 N. San Fernando Road
City, State, Zip: Burbank, CA 91504
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 3
Total # of full-time company employees worldwide: 550
Total # of full-time company employees in California: 550
Company: Shire LLC
Address: 4501 Colorado Blvd.
City, State, Zip: Los Angeles, CA 90039
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 80
Total # of full-time company employees worldwide: 16,000
Total # of full-time company employees in California: 2,500
Company: Space Exploration Technologies Corp. (SpaceX)
Address: 1 Rocket Road
City, State, Zip: Hawthorne, CA 90240
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 10
Total # of full-time company employees worldwide: 6,500
Total # of full-time company employees in California: 5,000
Company: Specific Machining Inc.
Address: 4540 Cecelia Street
City, State, Zip: Cudahy, CA 90201
Collective Bargaining Agreement(s): N/A
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

**Participating Employers in Retrainee  
Multiple Employer Contractor (MEC) Agreements  
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Contractor's Name: Glendale Community College  
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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Stoneland
Address: 11831 Vose Street
City, State, Zip: North Hollywood, CA 91605
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 1
Total # of full-time company employees worldwide: 145
Total # of full-time company employees in California: 145
Company: TRAK Microwave Corporation
Address: 375 Conejo Ridge Avenue
City, State, Zip: Thousand Oaks, CA 91361
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 20
Total # of full-time company employees worldwide: 264
Total # of full-time company employees in California: 86
Company: Trelleborg Sealing Solutions
Address: 2051 E. Maple Ave.
City, State, Zip: El Segundo, CA 90245
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 1
Total # of full-time company employees worldwide: 23,000
Total # of full-time company employees in California: 500
Company: Triumph Structures Los Angeles
Address: 9301 Mason Ave.
City, State, Zip: Chatsworth, CA 91311
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 100
Total # of full-time company employees worldwide: 13,000
Total # of full-time company employees in California: 264



**Training Proposal for:**  
**J & R Film Co., Inc. dba Moviola Education Center**  
**Agreement Number: ET19-0260**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** M. Webb

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate SB <100	Industry Sector(s):	Multimedia/Entertainment Services  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles, Orange, San Diego, Riverside, Nevada, San Bernardino, Kern	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Motion Picture Editors Guild, I.A.T.S.E., Local 700		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	≤20%		

**FUNDING DETAIL**

<b>Program Costs</b>	+	<b>Support Costs</b>	=	<b>Total ETP Funding</b>
\$409,500		\$28,350 8%		\$437,850

In-Kind Contribution:	50% of Total ETP Funding Required	\$213,000
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate SB <100	Computer Skills	70	8-200	0	\$834	\$16.70
				Weighted Avg: 30			
2	Retrainee Priority Rate	Computer Skills	455	8-200	0	\$834	\$16.70
				Weighted Avg: 30			

**Minimum Wage by County:** \$17.54 per hour for Los Angeles County; \$17.50 per hour for Orange County; \$17.03 per hour for San Diego County; and \$16.70 per hour for Riverside, San Bernardino, Kern, and Nevada Counties.

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

**Used to meet the Post-Retention Wage?:**  Yes  No  Maybe  
Up to \$2.50 per hour in health benefits to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Numbers 1 &amp; 2</b>		
Director		10
Producer		20
Editor		30
Assistant Editor		20
Production & Post Production Assistant		20
Editing Support Staff		10
Systems Engineer		20
Audio Engineer		20
Colorist		15
Compositor		20
Animator		25
Digital Special Effects Artist		25
3D Occupations Staff		15
Graphic Artist		30
Webmaster		20
Programmer		25



Quality Specialist		20
Customer Support Staff		20
Computer Technicians		20
Systems Support Analysts		15
Technical Support Staff		20
Digital Marketing Personnel		20
Equipment Operator		25
Video Tape Operator		15
Camera and Sound Staff		25
Digital Imaging Technician		20

## **INTRODUCTION**

Founded in 1926 and located in Burbank, J & R Film Co., Inc. dba Moviola Education Center (Moviola) ([www.moviola.com](http://www.moviola.com)) is a private, for profit, training center. Moviola provides training for workers in the entertainment industry, as well as the following services: post production of films and television, industry expendable sales, rental and support of non-linear editing systems, post production edit bays and offices, and workflow design. All participating employers are companies in the film, television and networking industry. This will be the Moviola's eighth ETP Agreement, and the second in the last five years.

### **Veterans Program**

Although Moviola does not actively "recruit" Veterans, the Company does hire Veterans that are qualified for positions. Current Veterans employed by the Company include the Senior Vice President, IT Staff and other personnel.

### **Union Support**

The training project is supported by the Motion Picture Editors Guild, I.A.T.S.E. Local 700 and National Association of Broadcast Employees & Technicians (NABET). A union letter of support has been submitted by Motion Picture Editors Guild, I.A.T.S.E. Local 700. Occupations under the NABET cannot start training until a letter of support has been received.

## **PROJECT DETAILS**

To remain competitive, employers in the entertainment industry must provide training to ensure workers are up-to-date on new technologies and computer software programs. Moviola is a leading vendor in the industry, providing curriculum topics in Computer Skills training and Advanced Technology. Trainees enrolled in Moviola training can earn the following certifications: Avid Certified User & Professional Certifications for Avid Media Composer, Avid Operator for Pro Tools, Avid Certifies Support Representative for Media Composer Systems, NEXIS Storage & Pro Tools Systems, and DaVinci Resolve User Certification.

The proposed training includes computer-aided design software courses that are updated on an on-going basis. As a result, workers must participate in training regularly to ensure staff is capable of using the latest advances in computer software. Training will introduce employees to new software being used for graphic design, and digital imaging. Participating Employers have identified specific training programs offered by Moviola that will benefit their company by

increasing employee skills and improving efficiencies. Moviola classes range from 8-48 training hours depending on course selection, and occur from one to six days.

### **Training Plan**

Training will be delivered via class/lab and E-learning in the following:

**Computer Skills:** Training will be offered to all occupations to increase employee skills in 3D computer technologies. Training delivered will improve worker ability to utilize updated and advanced computer software programs.

### **Commitment to Training**

Participating employers will continue to provide company-wide training alongside ETP funded training. Internal training will include on-the-job training, safety, and other state-mandated trainings. ETP funds will not displace the existing financial commitment to training.

#### ➤ Training Infrastructure

The Training Operations Manager will oversee all project administration. The Operations Manager successfully administered prior ETP Agreements and is familiar with ETP administration duties. Additional employees will provide assistance to ensure all tasks are executed successfully. Staff will schedule training for participating employers, collect ETP rosters, and upload all data to ETP online systems. Training will be delivered by in-house experts.

### **Marketing and Support Costs**

Moviola training opportunities are marketed through the Company's online website. Through networking, the company has also developed continued relationships with Employers and outside resource groups and organizations who seek training opportunities provided by Moviola.

Trainees and participating employers are provided surveys to provide feedback on the training programs offered via Moviola. In addition, Moviola staff will continue to market their training programs to new participating employers throughout the duration of the Agreement. As a result, the Company requests 8% and staff recommends support costs to assist with continued marketing efforts.

### **Trainer Qualifications**

Moviola is a leading training vendor in the entertainment industry, providing quality training to California businesses. Instructors of the company have the education and experience to provide training in Computer Skills training. All soft/hardware is upgraded on an annual basis, which results in instructors participating in training to ensure they are capable and well qualified to provide training to participating employers.

### **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.

**PRIOR PROJECTS**

The following table summarizes Contractor's performance by Moviola under an ETP Agreement that was completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET14-0221	Los Angeles	12/10/13- 12/09/15	\$531,536	\$467,183 (88%)

**RECOMMENDATION**

Staff recommends approval of this proposal.

**DEVELOPMENT SERVICES**

N/A

**ADMINISTRATIVE SERVICES**

N/A

**TRAINING VENDORS**

N/A

## **Exhibit B: Menu Curriculum**

### **Class/Lab Hours**

8-200

Trainees may receive any of the following:

#### **COMPUTER SKILLS**

- Avid Media Composer
  - Introduction to Avid Media Composer: Fundamentals I
  - Introduction to Avid Media Composer: Fundamentals II
  - Introduction to Avid Media Composer: Fundamentals I & II Combo
  - Introduction to Avid Media Composer: Basics (Avid for Producers)
  - Avid Media Composer: Professional Editing I
  - Avid Media Composer: Professional Editing II
  - Avid Media Composer: Professional Editing I & II Combo
  - Avid Media Composer for Final Cut Pro/Premiere Pro Editors
  - Avid Assistant Editing: Essentials
  - Avid Assistant Editing: Introduction to Avid Editing Systems Support
  - Avid Assistant Editing: HD-4K, DI, & File-Based Workflows
  - Avid Trimming Workshop
  - Audio for Avid Editors
  - Color Grading with Avid Media Composer & Symphony
  - Avid Multicam Workshop
- Avis Certified Support Representative
  - Avid Editing System Support Certification
  - Avid Editing System Support Re-Certification
  - Avid NEXIS System Support Certification
  - Avid Pro Tools System Support Certification
- Avid Pro Tools
  - Introduction to Pro Tools: Fundamentals I
  - Introduction to Pro Tools: Fundamentals II
  - Introduction to Pro Tools: Fundamentals I & II Combo
- Adobe After Effects, Photoshop & Premiere Pro
  - Introduction to Adobe After Effects
  - Intermediate Adobe After Effects
  - Adobe After Effects: Titling and Advanced Tricks
  - Introduction to Adobe Photoshop
  - Intermediate Adobe Photoshop
  - Introduction to Premiere Pro
  - Intermediate Premiere Pro
  - Premiere Pro for Avid/FCP Editors
- DaVinci Resolve
  - Introduction to DaVinci Resolve
  - Introduction to Fairlight Audio in DaVinci Resolve
  - Advanced Color in DaVinci Resolve
  - Advanced Editing in DaVinci Resolve
- Music Editing: A Practical Introduction

**E-Learning**

8-200

**COMPUTER SKILLS**

- Avid Editing System Support Certification
- Avid Nexus System Support Certification
- Avid Pro Tools System Support Certification

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: J & R Film Co., Inc. dba Moviola Education Center

CCG No.: ET19-0260

Reference No: 18-0476

Page 1 of 4

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: 7ate9 Inc., dba 7ate9 Entertainment

Address: 740 N. La Brea Ave.

City, State, Zip: Los Angeles, CA 90038

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 10

Total # of full-time company employees in California: 9

Company: Alpha Dogs, Inc.

Address: 1612 W. Olive Ave., Suite #200

City, State, Zip: Burbank, CA 91506

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 8

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

Company: American Film Institute

Address: 2021 N. Western Ave.

City, State, Zip: Los Angeles, CA 90027

Collective Bargaining Agreement(s): The Motion Picture Editors Guild, IATSE Local 700

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

Total # of full-time company employees worldwide: 150

Total # of full-time company employees in California: 126

Company: Big Picture Entertainment, LLC

Address: 3524 Hayden Ave.

City, State, Zip: Culver City, CA 90232

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 38

Total # of full-time company employees in California: 38

## Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: J & R Film Co., Inc. dba Moviola Education Center

CCG No.: ET19-0260

Reference No: 18-0476

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Company: Catalyst Post Services

Address: 3029 W. Burbank Blvd.

City, State, Zip: Burbank, CA 91505

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 7

Total # of full-time company employees in California: 7

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Company: Filmtools

Address: 1400 W. Burbank Blvd.

City, State, Zip: Burbank, CA 91506

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 15

Total # of full-time company employees worldwide: 30

Total # of full-time company employees in California: 30

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Company: Fox Networks Engineering & Operations

Address: 10201 W. Pico Blvd.

City, State, Zip: Los Angeles, CA 90035

Collective Bargaining Agreement(s): The Motion Picture Editors Guild, IATSE Local 700; NABET

Estimated # of employees to be retrained under this Agreement: 80

Total # of full-time company employees worldwide: 1,000+

Total # of full-time company employees in California: 1,000+

---

Company: J&R Film Co. dba Moviola

Address: 1015 N. Hollywood Way

City, State, Zip: Burbank, CA 91505

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 15

Total # of full-time company employees worldwide: 30

Total # of full-time company employees in California: 30

**Participating Employers in Retrainee  
Multiple Employer Contracts**

Contractor's Name: J & R Film Co., Inc. dba Moviola Education Center

CCG No.: ET19-0260

Reference No: 18-0476

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Company: Picture Head, LLC

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Address: 1132 Vine St.

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City, State, Zip: Hollywood, CA 90038

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Collective Bargaining Agreement(s): No

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Estimated # of employees to be retrained under this Agreement: 128

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Total # of full-time company employees worldwide: 128

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Total # of full-time company employees in California: 128

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Company: Picture Shop, LLC

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Address: 3900 W. Alameda Blvd., 10<sup>th</sup> Floor

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City, State, Zip: Burbank, CA 91505

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Collective Bargaining Agreement(s): No

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Estimated # of employees to be retrained under this Agreement: 152

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Total # of full-time company employees worldwide 152

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Total # of full-time company employees in California: 152

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Company: Point.360

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Address: 2701 Media Center Dr.

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City, State, Zip: Los Angeles, CA 90065

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Collective Bargaining Agreement(s): No

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

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Total # of full-time company employees worldwide: 195

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Total # of full-time company employees in California: 195

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Company: Telestream, LLC

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Address: 848 Gold Flat Road

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City, State, Zip: Nevada City, CA 95959

---

Collective Bargaining Agreement(s): No

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

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Total # of full-time company employees worldwide: 360

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Total # of full-time company employees in California: 161

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**Participating Employers in Retrainee  
Multiple Employer Contracts**

Contractor's Name: J & R Film Co., Inc. dba Moviola Education Center

CCG No.: ET19-0260

Reference No: 18-0476

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Company: Trailer Park, Inc.

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Address: 6922 Hollywood Blvd., 12<sup>th</sup> Floor

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City, State, Zip: Hollywood, CA 90028

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Collective Bargaining Agreement(s): No

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Estimated # of employees to be retrained under this Agreement: 10-20

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Total # of full-time company employees worldwide: 410

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Total # of full-time company employees in California: 410

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Company: Union Editorial LLC

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Address: 12200 W. Olympic Blvd., Suite 140

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City, State, Zip: Los Angeles, CA 90064

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Collective Bargaining Agreement(s): No

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

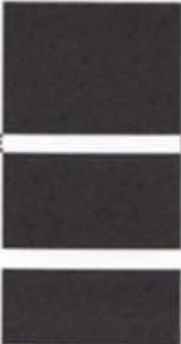
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Total # of full-time company employees worldwide: 35

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Total # of full-time company employees in California: 35

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**MOTION PICTURE EDITORS GUILD**

07/18/2018

To Whom It May Concern:

The Motion Picture Editors Guild, I.A.T.S.E. Local 700, supports Moviola Digital's effort to participate in the ETP program. Local 700 represents over 6000 members, many of whom would and already have benefited from the ETP Program.

Our industry is constantly undergoing technological changes so it is critical that our members utilize training to keep their skills up to date. They must continue their training as new systems and software become available.

Moviola Digital is already an approved facility and participant in the Motion Picture Editors Guild Training Program.

Should you have any questions or if there is anything we can do to facilitate Moviola Digital's participation in the ETP program, please let us know.

Sincerely,



Dieter Rozek  
Training Coordinator



**Training Proposal for:  
Managed Career Solutions, Spc.**

**Agreement Number: ET19-0258**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** E. Wadzinski

**PROJECT PROFILE**

Contract Attributes:	New Hire Veterans Multiple Barriers Medical Skills Training SET	Industry Sector(s):	Services Healthcare  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles, Orange, San Diego, Ventura	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Turnover Rate:	N/A		
Managers/Supervisors: (% of total trainees)	N/A		

**FUNDING DETAIL**

<b>Program Costs</b>	+	<b>Support Costs</b>	=	<b>Total ETP Funding</b>
\$260,000		\$35,939 (Job 1: 20% Job 2: 12%%)		\$295,939

In-Kind Contribution:	50% of Total ETP Funding Required	N/A
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	New Hire Veterans SET Multiple Barriers	Comm'l Skills, Computer Skills, Other Skills-Job Readiness	33	8-260	0	\$6,032	*\$13.66
				Weighted Avg: 200			
2	New Hire SET Medical Skills Multiple Barriers	MS-Didactic, MS-Preceptor, Computer Skills, Other Skills-Job Readiness	17	8-260	0	\$5,699	*\$13.66
				Weighted Avg: 200			

\*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 and 2 (SET/New Hire): \$14.62 per hour for Los Angeles County; \$14.58 per hour for Orange County; \$14.19 per hour in San Diego County; and \$13.66 per hour in Ventura County.

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

**Used to meet the Post-Retention Wage?:**  Yes  No  Maybe  
Up to \$0.62 per hour in Job Number 1 and up to \$1.37 per hour in Job Number 2

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Veteran Executive Protection Agent		33
<b>Job Number 2</b>		
Certified Nurse Assistant		17

**INTRODUCTION**

Founded in 1987, Managed Career Solutions, Spc. (MCS) ([www.mcscareergroup.com](http://www.mcscareergroup.com)) provides workforce development services in Los Angeles County. These services include outreach, intake, case management, job training and job placement for adults and dislocated workers, with priority service to veterans. The Company assists in providing trainees with skills to help maintain gainful employment based on their education, work history and interest.

## Veterans Program

MCS requests ETP funds to train and place unemployed veterans (Job Number 1) who have served on active full-time duty in the Armed Forces and were honorably discharged or released from active duty because of a service-connected disability; and reservists who have served on active full-time duty and are still on reserve status under the Panel's Veterans Program.

The Panel has established incentives for training Veterans.

- Support Costs are 20% for Veterans to encourage focused outreach.
- Incidental Placement with public and nonprofit entities is permissible not to exceed 45%.
- Retention for Veterans may be satisfied by employment of at least 30 hours a week (instead of the standard 35) for at least 90 consecutive days. For occupations in which it is not customary to be employed 90 consecutive days, retention may be satisfied by employment of at least 500 hours within 272 days (the longest time period permitted by statute).

## PROJECT DETAILS

Training will address industry demands for workers in healthcare and advanced security. MCS has identified employers that have made firm commitments to hire the participants upon successful completion of training.

MCS will provide training for Executive Protection Agents to place veterans in employment with a focus on security. MCS was very successful in placing Veterans in these positions under its prior Agreement and exceeded the initial number of Executive Protection Agents placed and retained in employment for this occupation.

Training will also be provided for Certified Nurses Assistants (CNA's). MCS has been successful in using American Medical Careers as a training vendor due to its success and the high probability of training and placing individuals with significant barriers to employment. CNA training is an excellent point of entry to the healthcare industry. CNA trainees gain critical and meaningful work skills and experience to gain access to employment in the healthcare industry.

### Training Plan

**Commercial Skills:** Training will be offered to Veteran Executive Protection Agents. This training will focus on the fundamentals of protecting high-profile clientele. In addition to patrol, monitoring, and report writing responsibilities, these courses will also cover the specifics of estate security and dealing with paparazzi.

**Medical Skills:** Training will be provided to CAN's. Course topics will outline the California Department of Public Health standards of 100 hours clinical (preceptor) and 60 hours of didactic training to meet the qualifications of the CNA training program. Training in each module starts with didactic training, followed by preceptor training. This training model is effective in ensuring trainees are competent in the subject matter. After ETP-funded training is complete, trainees will be eligible to take a state exam to receive this certification.

**Computer Skills:** Training may be provided to all occupations and is designed to ensure trainees have a broad foundational knowledge of common software platforms.

**Other Skills - Job Readiness Training:** Training is designed to assist participants in preparing a Job Application dossier, including an updated resume, cover letter, and employment application. Additional modules focus on interviewing techniques, workplace skills, transition skills, customer service, communications and other skills as required to help veterans become competitive job candidates and prepare them for successful entry into the labor market.

### **Special Employment Training/Multiple Barriers**

This project will target workers with multiple barriers to employment (Job Numbers 1 and 2) who lack essential job skills necessary to improve their employment opportunities. Trainees may be affected by lack of prior educational opportunities and intermittent work histories. They may have several barriers to employment, as well as limited literacy skills, education and an inconsistent employment history.

#### ➤ Wage Modification

Trainees in Job Numbers 1 and 2 have two or more barriers to employment (e.g., adult learners who may be returning to the classroom after many years, mental or physical disability, limited English proficiency, limited work experience and limited math skills). These multiple barrier trainees are eligible to receive the ETP Standard Wage.

#### ➤ Retention Modification

In Job Number 2, CNA's are eligible for full time employment and retention modifications. MCS requests to modify the full-time employment retention requirement from 35 to 30 hours per week in a 90-day period. Additionally, MCS requests an alternate retention of 500 hours within 272 days with one or more employers to satisfy the retention requirement.

#### ➤ Incidental Placement

For CNA's in Job Number 2, MCS is requesting Incidental Placement with public and nonprofit entities of up to 45% instead of the 20% allowed for trainees with multiple barriers. MCS has recently been working closely with Los Angeles County USC Hospital and has been successful in placing CNAs in long-term gainful employment at this facility.

### **Impact/Outcome**

Upon completion of the nursing skills training, trainees will become CNAs. Certifications are awarded by the Department of Public Health.

The trainees completing the Executive Protection Agent training will receive Guard Card Certification, as well as Firearm and Baton permits.

### **Trainer Qualifications**

CNA training will be administered by American Medical Careers (a division of MCS; approved by the California Department of Public Health). The training will be delivered by Licensed Vocational Nurses and supervised by Registered Nurses.

Training for Executive Protection Agents will be administered by Advanced Security Concepts, Inc. This training will be delivered by retired police officers with all current licenses and permits.

Job Readiness, Computer Skills and some Continuous Improvement training will be provided by MCS through its own instructors or those of a qualified vendor.

### **Training Coordinator**

The Program Director will oversee all program administration. Two full-time employees will handle the recruitment of trainees, referrals and reporting. MCS will provide job placement and retention services and coordinate the efforts of all training entities. MCS will also have the assistance of WorkSource Center staff.

### **Marketing, Recruitment and Support Costs**

MCS plans to market and recruit trainees through three of its One-Stop Career Centers, the Employment Development Department, and various other one-stop centers throughout the Los Angeles area. MCS has been providing return-to-work activities since the 1990s and has established longstanding relationships with local area employers. Employers have already been identified for job placement.

MCS requests 20% support costs for Veteran new hires (Job Number 1) and 12% for new hires with Multiple Barriers (Job Number 2) to assist in recruitment, employer outreach, and assessment of employer-specific job requirements. Although many of the participating employers have already been notified, additional outreach and needs assessments will continue throughout the Agreement term.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned	
				\$	%
ET16-0239	Los Angeles	11/06/15 – 11/05/17	\$199,000	\$180,072	(91%)
ET13-0183*	Los Angeles	10/22/12-10/21/14	\$231,899	\$140,273	(61%)

\*ET13-0183 – The focus for training in this project was Veterans in Healthcare (CNA) and Technical Services (Executive Protection). MCS estimated 52 participants; however, 65 participants completed training. Veteran CNAs did not experience good retention as trainees left their positions before the required retention term. Conversely, veteran participants in technical services found a seamless match and continue to thrive as Executive Protection Agents. Low earnings were a direct result of low retention for CNAs.

### **DEVELOPMENT SERVICES**

N/A

### **ADMINISTRATIVE SERVICES**

N/A

**TRAINING VENDORS**

Advanced Security Concepts, Inc. of Encino will provide Commercial Skills training for Executive Protection Agents for an amount to be determined.

American Medical Careers in Los Angeles (a division of MCS) will provide Medical Skills training for CNA's for an amount to be determined.



## Exhibit B: Menu Curriculum

### Class/Lab Hours

8-260 Trainees may receive any of the following:

#### MEDICAL SKILLS-DIDACTIC

- ✚ Introduction to Nursing
- ✚ Body Mechanics
- ✚ Medical and Surgical Asepsis
- ✚ Weights and Measures
- ✚ Patient Care Practices and Procedures
- ✚ Vital Signs
- ✚ Nutrition
- ✚ Introduction to Aide and Agency Roles
- ✚ Interpretation of Medical and Social Needs of Patients
- ✚ Personal Care Services
- ✚ Cleaning and Care Tasks in the Home
- ✚ Leadership Core Competencies
- ✚ Medical Overview
- ✚ Demonstration of Clinical Competency
- ✚ CPR
- ✚ Fire and Safety

#### MEDICAL SKILLS-PRECEPTOR (Ratio 1:10)

- ✚ Body Mechanics
- ✚ Medical and Surgical Asepsis
- ✚ Weights and Measures
- ✚ Patient Care Practices and Procedures
- ✚ Vital Signs
- ✚ Nutrition
- ✚ Personal Care Services
- ✚ Cleaning and Care Tasks in the Home
- ✚ Demonstration of Clinical Competency

#### COMMERCIAL SKILLS

- ✚ Executive Protection Fundamentals
- ✚ Arrest and Control
- ✚ Chemical Agents
- ✚ Taser Use
- ✚ Guard Card Certification
- ✚ Firearm Training and Permit
- ✚ Baton Training and Permit
- ✚ Active Shooter Training

#### COMPUTER SKILLS

- ✚ Microsoft Suite (Word, Excel, Outlook, Power Point)
- ✚ Online Document Management Suites (One Drive or Google Drive)

#### JOB READINESS TRAINING

- ✚ Finding Job Placement Leads
- ✚ Resume Review and Writing

- ✚ Interview Preparation
- ✚ Conflict Resolution and Equal Opportunity
- ✚ Diversity and Disability Ettiique Training
- ✚ Customer Service
- ✚ Communication Skills
- ✚ Conflict Resolution
- ✚ Equal Opportunity and Civil Rights
- ✚ Workplace Behavior

Job Readiness training cannot exceed 50% of total training hours per-trainee.

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



**Training Proposal for:**  
**Riviera, Inc. dba The Enterprise U**  
**Agreement Number: ET19-0256**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** E. Wadzinski

**PROJECT PROFILE**

Contract Attributes:	Retrainee SB <100 Priority Rate	Industry Sector(s):	Manufacturing Services Technology/IT  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Statewide	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	≤20%		

**FUNDING DETAIL**

<b>Program Costs</b>	+	<b>Support Costs</b>	=	<b>Total ETP Funding</b>
\$888,100		\$61,555 8%		\$949,655

In-Kind Contribution:	50% of Total ETP Funding Required	\$1,800,000
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Comm'l. Skills, Computer Skills, Cont. Imp., HazMat, Hazwoper, Literacy Skills, Mfg. Skills, OSHA 10/30	434	8-200	0	\$1,390	\$16.70
				Weighted Avg: 50			
2	Retrainee	Business Skills, Comm'l. Skills, Computer Skills, Cont. Imp., HazMat, Hazwoper, Literacy Skills, Mfg. Skills, OSHA 10/30	185	8-200	0	\$1,230	\$16.70
				Weighted Avg: 50			
3	Retrainee SB<100	Business Skills, Comm'l. Skills, Computer Skills, Cont. Imp., HazMat, Hazwoper, Literacy Skills, Mfg. Skills, OSHA 10/30	95	8-200	0	\$1,251	\$16.70
				Weighted Avg: 45			

**Minimum Wage by County:** \$18.22 per hour for Alameda, Contra Costa, Marin, San Francisco, San Mateo and Santa Clara Counties; \$17.54 per hour for Los Angeles County; \$17.50 per hour for Orange County; \$17.03 per hour for San Diego County; \$16.80 per hour for Sacramento and \$16.70 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

Up to \$2.50 per hour may be used to meet the Post-Retention Wage for Job Numbers 1-3.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Accounting and Finance		80
Administration/Operations		194
IT/Engineering		80

Managers		80
Marketing and Sales		80
Production		200

## **INTRODUCTION**

Riviera, Inc. dba The Enterprise U (The Enterprise U) ([www.theenterpriseU.com](http://www.theenterpriseU.com)) was founded in 2001 to help companies, governments, and individuals acquire and sustain a competitive advantage through learning. The Enterprise U provides training services, consulting, coaching and software solutions to clients in the industries of manufacturing, entertainment, technology, logistics, and biotechnology.

## **PROJECT DETAILS**

Although The Enterprise U's current contract does not end until June 2019, the Company is seeking a new funding as it anticipates funds will be exhausted by October 2018. With the 90-day retention period, all contract requirements will be completed by January 2019.

Participating employers have expressed a need for training as they are struggling to keep up with technology and competitors. Many are investing in automated systems and software packages to increase productivity, efficiency, and accuracy; requiring specific skill-building training to ensure employees can be productive and effective. Additionally, participating employers are reorganizing operations in an effort to implement new business processes, development and technology changes.

### **Curriculum Development**

The Enterprise U's curriculum has been shaped and determined through years of pre-training assessments and consultation with participating employers and leading economic development groups. The curriculum courses are customized according to specific business improvement goals and employee skills assessments. The Enterprise U meets with employer representatives and department heads to define goals and devise curriculum topics that address company-specific training objectives. The Enterprise U also relies on feedback from management and frontline workers to measure the effectiveness of training and to help define strategies for prospective skills development opportunities.

### **Training Plan**

Training will be delivered via class/lab in the following:

**Business Skills:** Training will be offered to all occupations in customer service, communication, strategic thinking, negotiation techniques and presentation skills. Trainees will learn to interact more effectively with internal and external customers and enhance business performance.

**Commercial Skills:** Training will be offered to Engineering, Production, Managers and Operations. Trainees will be provided with skills on best practices in facilities management, environmental management and emergency response.

**Computer Skills:** Training will be offered to all occupations. Trainees will learn how to be more proficient with multiple office productivity applications, computer graphics, project applications and computer troubleshooting.

**Continuous Improvement:** Training will be offered to all occupations to enhance teamwork, problem solving and decision making skills. These modules will provide workers with the skills needed to implement new processes, improve productivity, and become stronger leaders through teambuilding.

**Hazardous Materials:** Training will be offered to Engineering, Production, Managers and Operations. Training is targeted to manufacturing companies that have cleanrooms or a lab environment and must maintain a chemical hygiene plan cleaning and handling hazardous materials.

**Literacy Skills:** Training will be offered to Production, Administration and Operations. This training will help employers improve written and verbal communication skills for those individuals for whom English is their second language.

**Manufacturing Skills:** Training will be offered to Production, Operations and Managers to improve production efficiencies, enhance inventory control measures and reduce waste.

### **Certified Safety Training**

**OSHA 10/30:** This training is a series of courses “bundled” by industry sector and occupation. It will be offered to Engineering, Production, Managers, and Operations. It consists of 10 hours of classroom or CBT training for journey-level workers and 30 hours for frontline supervisors. The coursework is geared to construction work, and also manufacturing. Completion of the training can result in a certificate that expands employment opportunities.

**Hazardous Waste Operations and Emergency Response Standard (HAZWOPER):** Training may be provided to Production, Engineering, Managers and Operations staff and will provide skills needed to safely handle and dispose of hazardous materials on the jobsite. This training is also a series of courses, specific to industry sectors involved in the transport of hazardous materials. The coursework varies in length depending on the industry and the occupational title, as organized in five levels ranging from “first responder” to “incident commander.” It is generally a minimum of 24 hours with an 8-hour annual refresher, and will be delivered by classroom training. Completion of the training results in a certificate that expands employment opportunities.

### **Commitment to Training**

ETP funds will not displace the existing financial commitment of training by participating employers. The smaller participating employers have very limited training resources and ETP funding will allow them to offer formal, on-site training to their employees. For the larger employers targeted for this project, most of their existing training resources are utilized to cover basic training, such as new-hire orientation, basic skills, human resource topics, general computer skills, and on-the-job training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

#### ➤ Training Infrastructure

The Enterprise U’s Executive Director will oversee the implementation and administration of this project with two internal staff members. The Enterprise U’s staff has participated in administering the Enterprise U’s prior ETP projects and is very knowledgeable of ETP’s administrative processes. Training will be provided by in-house experts at participating employer worksites.

## Training Agency Certification

The Enterprise U is eligible as a training agency licensed by the Bureau for Private Postsecondary Education.

## Marketing and Support Costs

The Enterprise U's marketing and recruitment efforts include networking with human resource professionals and various training and development entities such as Professionals in Human Resources Association, American Society for Training and Development, and the Society for Human Resources Association. The Enterprise U's outreach activities consist of newsletters, e-mail/online marketing campaigns, and direct contact via telephone. These activities help The Enterprise U keep its program aligned with the needs of its employer community.

The Enterprise U also allocates resources to perform needs assessments, curriculum customization, and return on investment analyses. The Enterprise U is requesting support costs to fund extensive marketing efforts and the recruitment of additional participating employers. Staff believes 8% Support Costs are justified for the reasons set forth above.

## 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 The Enterprise U under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET18-0109	\$848,252	07/01/17 – 06/30/19	804	900	670

Based on ETP Systems, 32,659 reimbursable hours have been tracked for potential earnings of \$653,992 (77% of approved amount). At this time, 670 trainees have completed training and retention. The Contractor expects to complete all training by October 2018 to earn 100% of the Agreement amount.

## PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0186	Statewide	10/01/15 – 09/30/17	\$909,000	\$886,932 (98%)

ET15-0221	Statewide	09/02/14 – 09/01/16	\$410,600	\$408,310 (99%)
ET13-0357	Statewide	05/01/13- 04/30/15	\$303,266	\$303,266 (100%)

**DEVELOPMENT SERVICES**

N/A

**ADMINISTRATIVE SERVICES**

N/A

**TRAINING VENDORS**

N/A



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

8–200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- ✚ Customer Service Skills
- ✚ Accountability, Empowerment & Delegating
- ✚ Effective Meeting Skills
- ✚ Dynamic Presentation Skills
- ✚ Effective Communication Skills
- ✚ Negotiation Techniques
- ✚ Maximizing Interpersonal Skills
- ✚ Time Management & Managing Productivity
- ✚ Sales & Marketing Performance
- ✚ Relationship Building
- ✚ Strategic Thinking & Planning
- ✚ Creative Thinking & Problem Solving
- ✚ Effective Decision Making
- ✚ Financial Fundamentals
- ✚ Effective Goal-Setting
- ✚ Competitive Product, Market or Technology Knowledge
- ✚ Project Management
- ✚ Managing Change
- ✚ Performance Management
- ✚ Organizational Development
- ✚ Knowledge Management
- ✚ Focusing, Executing, & Getting Things Done
- ✚ Success in the Workplace
- ✚ Creating a Continuous Learning Culture
- ✚ Creating a Culture of Innovation
- ✚ Business Analysis & Critical Thinking
- ✚ Appreciating Our Differences
- ✚ Succession Planning
- ✚ Business Processes
- ✚ Employee Engagement

**COMMERCIAL SKILLS**

- ✚ Facilities Management
- ✚ Environmental Management
- ✚ Emergency Response

**COMPUTER SKILLS****Desktop and Cloud Applications**

- ✚ Office Productivity Applications – (Intermediate/Advanced Microsoft Office Suite, Lotus Notes and Google)
- ✚ Computer Graphics
- ✚ Operating Systems
- ✚ Project Applications
- ✚ System, Web and Mobile Tools
- ✚ Working in the Cloud

Accounting

- ✚ Accounting Theory
- ✚ Accounting Applications
- ✚ Accounting Practices

PC Troubleshooting, Maintenance and Repair

- ✚ Electronics Theory
- ✚ Understanding Devices and Multiple Platforms
- ✚ Diagnosing Problems
- ✚ Maintaining Your Equipment and Finding Service
- ✚

Software Engineering

- ✚ Programming in Visual Basic
- ✚ Programming in C
- ✚ Programming in C++
- ✚ Programming in C# and .NET
- ✚ Programming in Java
- ✚ Programming in SQL
- ✚ Software Lifecycle Methodologies

Database Engineering

- ✚ Oracle Databases
- ✚ SQL Databases
- ✚ DB2 Databases

Software Platforms

- ✚ Oracle/PeopleSoft Software Platform
- ✚ SAP Software Platform
- ✚ IBM/Lotus Software Platform

Business Intelligence

- ✚ Reporting and Analyzing Data Using Statistics and Metrics
- ✚ Scorecarding with Key Performance Indicators and Strategic Objectives

Web

- ✚ HTML
- ✚ Ruby and Ruby on Rails
- ✚ Dreamweaver
- ✚ Flash
- ✚ JavaScript
- ✚ CSS
- ✚ SharePoint
- ✚ XML/XSLT
- ✚ Service Oriented Architecture, REST APIs
- ✚ Python / Django
- ✚ PHP
- ✚ ASP.NET

Computer Graphics, Digital Media & Modeling

- ✚ Animation Techniques
- ✚ Physics and Art Topics
- ✚ Adobe (Photoshop, Illustrator, InDesign)

- ✚ Computer-Aided Drafting/Manufacturing/Engineering
- ✚ Revit
- ✚ SketchUp
- ✚ SolidWorks

#### Network Engineering

- ✚ Electronics Overview
- ✚ Microsoft Technology in Networking
- ✚ Cisco Technology in Networking

#### Operating Systems

- ✚ Windows Operating System in the Network
- ✚ Novell Operating System in the Network
- ✚ UNIX Operating System in the Network

#### Security Issues

- ✚ Network Security Essentials, Key Principles and Concepts
- ✚ Risk Assessment and Auditing
- ✚ Security Incident Handling
- ✚ Securing Business Applications
- ✚ Web Security

#### **CONTINUOUS IMPROVEMENT**

- ✚ Levels of Performance
- ✚ Performance Management
- ✚ Change Management
- ✚ Process Management
- ✚ Total Quality Management
- ✚ Process Mapping
- ✚ Quality Assurance
- ✚ Six Sigma Concepts
- ✚ Lean Concepts
- ✚ Statistical Process Engineering

#### Team Building

- ✚ Team Building, Dynamics & Leadership
- ✚ Leadership Skills
- ✚ Employee Engagement
- ✚ Motivating Others
- ✚ Recognizing Performance
- ✚ Coaching
- ✚ Setting Expectations & Giving Feedback
- ✚ Talent Development Lifecycle
- ✚ Building Successful Teams

#### **MANUFACTURING SKILLS**

- ✚ Production Operations
  - Fluid Mechanics
  - Machine Shop Basics
  - Motor Controls
  - Power Transmission
- ✚ Inventory Control
- ✚ Warehousing & Distribution

- ✚ Blueprint Reading
- ✚ Equipment Operations and Maintenance

**HAZWOPER**

- ✚ HAZWOPER

**OSHA 10/30** (Certified OSHA Instructor)

- ✚ OSHA 10
- ✚ OSHA 30

**HAZARDOUS MATERIALS**

- ✚ Hazardous Materials Handling & Cleaning

**LITERACY SKILLS**

Vocational English & Math

- ✚ Reading and Writing Business Documents
- ✚ Business English
- ✚ Business Math

Literacy Training cannot exceed 45% of total training hours per-trainee  
Safety Training cannot exceed 10% of total training hours per-trainee (This cap does not apply to Hazmat, OSHA 10/30 or HAZWOPER)

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

## Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Riviera, Inc. dba The Enterprise U

CCG No.: ET19-0256

Reference No: 19-0006

Page 1 of 3

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: BlackLine Systems

Address: 21300 Victory Blvd., 12<sup>th</sup> Floor

City, State, Zip: Woodland Hills, CA 91367

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 800

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

Company: Honeybee Foods

Address: 16125 Valley Blvd.

City, State, Zip: City of Industry, CA 91744

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 60

Total # of full-time company employees worldwide: 624

Total # of full-time company employees in California: 435

Company: Microfabrica

Address: 7911 Haskell Ave.

City, State, Zip: Van Nuys, CA 91406

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 81

Total # of full-time company employees in California: 81

Company: NDS

Address: 21300 Victory Blvd., Suite 215

City, State, Zip: Woodland Hills, CA 91367

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 574

Total # of full-time company employees in California: 440

## Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Riviera, Inc. dba The Enterprise U

CCG No.: ET19-0256

Reference No: 19-0006

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Company: New Hampshire Ball Bearings

Address: 9700 Independence Ave.

City, State, Zip: Chatsworth, CA 91311

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 60

Total # of full-time company employees worldwide: 1,521

Total # of full-time company employees in California: 356

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Company: Panasonic Appliances Refrigeration System Corporation of North America

Address: 2055 Sanyo Ave.

City, State, Zip: San Diego, CA 92154

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 300,000

Total # of full-time company employees in California: 70

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Company: Revasum

Address: 825 Buckley Rd.

City, State, Zip: San Luis Obispo, CA 93401

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 60

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

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Company: SPTS Technologies

Address: 2381 Bering Dr.

City, State, Zip: San Jose, CA 95131

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 500

Total # of full-time company employees in California: 53

## Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Riviera, Inc. dba The Enterprise U

CCG No.: ET19-0256

Reference No: 19-0006

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Company: Staar Surgical

Address: 1911 Walker Ave.

City, State, Zip: Monrovia, CA 91016

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 400

Total # of full-time company employees in California: 250

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Company: Verisk 3E

Address: 3207 Grey Hawk Ct., Suite 200

City, State, Zip: Carlsbad, CA 92010

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 361

Total # of full-time company employees in California: 153

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Company: World Oil

Address: 9302 Garfield Ave.

City, State, Zip: South Gate, CA 90280

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 69

Total # of full-time company employees in California: 69

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**Training Proposal for:**

**Workforce Development Corporation of Southeast Los Angeles County, Inc. dba Southeast Los Angeles County Workforce Development Board**

**Agreement Number: ET19-0268**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** M. Reeves

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate SB <100 Veterans	Industry Sector(s):	Manufacturing Goods Movement Transportation/Logistics Construction Engineering 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 Intern'l Assoc. of Machinists and Aerospace Workers Local 1484		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	≤20%		

**FUNDING DETAIL**

<b>Program Costs</b>	+	<b>Support Costs</b>	=	<b>Total ETP Funding</b>
\$571,360		\$40,206 (8% Jobs 1-3, 5&6 12% Job 4)		\$611,566

In-Kind Contribution:	50% of Total ETP Funding Required	\$730,325
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Comm'l. Skills, Computer Skills, Cont. Imp., HazMat, Hazzwoper, Literacy Skills, Mgmt. Skills, Mfg. Skills, OSHA 10/30	190	8-200	0	\$1,668	\$16.70
				Weighted Avg: 60			
2	Retrainee SB<100	Business Skills, Comm'l. Skills, Computer Skills, Cont. Imp., HazMat, Hazzwoper, Literacy Skills, Mgmt. Skills, Mfg. Skills, OSHA 10/30	130	8-200	0	\$1,529	\$16.70
				Weighted Avg: 55			
3	Retrainee	Business Skills, Comm'l. Skills, Computer Skills, Cont. Imp., HazMat, Hazzwoper, Literacy Skills, Mgmt. Skills, Mfg. Skills, OSHA 10/30	6	8-200	0	\$1,230	\$16.70
				Weighted Avg: 50			
4	Retrainee Veterans	Business Skills, Comm'l. Skills, Computer Skills, Cont. Imp., HazMat, Hazzwoper, Literacy Skills, Mgmt. Skills, Mfg. Skills, OSHA 10/30	8	8-200	0	\$915	\$16.70
				Weighted Avg: 30			
5	Retrainee Priority Rate	Business Skills, Comm'l. Skills, Computer Skills, Cont. Imp., HazMat, Hazzwoper, Literacy Skills, Mgmt. Skills, Mfg. Skills, OSHA 10/30 OSHA 10/30	23	8-200	0	\$1,668	\$16.70
				Weighted Avg: 60			

6	Retrainee SB<100	Business Skills, Comm'l. Skills, Computer Skills, Cont. Imp., HazMat, Hazwoper, Literacy Skills, Mgmt. Skills, Mfg. Skills, OSHA 10/30	28	8-200	0	\$1,529	\$16.70
				Weighted Avg: 55			

**Minimum Wage by County:** \$18.22 per hour for Alameda, Contra Costa, Marin, San Francisco, San Mateo, and Santa Clara counties; \$17.54 per hour for Los Angeles County; \$17.50 per hour for Orange County; \$17.03 per hour for San Diego County; \$16.80 per hour for Sacramento County; and \$16.70 per hour for all other counties.

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

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

Up to \$2.50 per hour in health benefits may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Production Staff		130
Clerical Staff		40
Supervisor/Manager		25
Machinist		50
Engineering Support		30
Production Control		25
Material Handler		16
Maintenance Repairer		25
Engineer		9
Shipping/Receiving		16
Glazier		4
Construction Laborer		12
Owner/Chief Executive (Job Numbers 2 & 6 only)		3

## INTRODUCTION

Workforce Development Corporation of Southeast Los Angeles County, Inc. dba Southeast Los Angeles County Workforce Development Board (SELACO) ([www.selacowdb.com](http://www.selacowdb.com)) was formed in 1983. SELACO specializes in providing business solutions for employers seeking the resources to provide upskill training for existing and new employees. SELACO provides services to businesses mainly located in the Southeast Los Angeles and Orange County areas. SELACO hosts manufacturing symposia and business/labor roundtables to maintain ongoing strategies and efforts to train California workers. SELACO also works collaboratively with employers, economic

development agencies, and labor organizations to address the challenges of business growth and employee retention.

The proposed training will be provided primarily to manufacturing employers; however, companies from additional business sectors facing out-of-state competition are also expected to participate. Training will be provided statewide; however, most of the training is expected to take place in Los Angeles and Orange Counties. This will be SELACO's seventeenth ETP Agreement.

### **Veterans Program**

SELACO is committed to retraining 12 incumbent-worker Veterans who have served on active full-time duty in the Armed Forces (Job Number 4). The Panel has established higher support costs are available to reach participants for this program.

### **Apprenticeship**

There are numerous apprenticeship programs throughout the state for Machinists and Glaziers. These apprenticeship programs often run 24-48 months as compared to courses specific to Machinists and Glaziers in the proposed curriculum. However, training in this proposal will not displace the apprenticeship training programs.

## **PROJECT DETAILS**

SELACO's business improvement and training initiatives are developed through extensive collaboration and discussions with advisory committees, focus groups and employers. SELACO relies on industry data and market trend analysis to identify key factors affecting business growth. Employers have expressed the need to close an existing skills gap in manufacturing, goods movement, and construction. Participating employers have identified the need for training in process improvements and new technology, as they continue to invest in advanced systems and programs designed to increase productivity, operational efficiency and customer service.

Some core employers may have participated in at least one of the SELACO's previous Agreements. Further, several topics from the proposed Curriculum are repeated from prior ETP Agreements. However, no trainees that participated in prior ETP projects will receive duplicative training in this proposed Agreement.

### **Training Plan**

ETP-funded training will assist employers to provide training in courses that fill worker skill gaps. Training is customized to meet the needs of participating employers. The core group of employers represents at least estimated 80% of the requested funding.

**Business Skills:** Training will be offered to all occupations to interact effectively with internal and external customers and provide better customer service and quality control.

**Commercial Skills:** Training will be offered to Construction Laborers. Training will cover construction fundamentals and industry-specific construction management skills.

**Computer Skills:** Training will be offered to all occupations to utilize innovative software solutions, including database technology and business applications.

**Continuous Improvement:** Training will be offered to all occupations to enhance problem solving and decision-making skills. These courses will enable skilled workers to increase efficiency, thereby lowering operating costs.

**Literacy Skills:** Training will be offered to Production Staff to help workers overcome language barriers that impede teamwork and productivity.

**Management Skills:** Training will be offered to Managers/Supervisors to enhance their ability to communicate, lead, motivate and plan.

**Manufacturing Skills:** Training will be offered to Production Staff, Machinists, Maintenance Repairers, Production Control, and Engineers. Courses will include Programmable Logic Control, Kaizen Methods, Machine/Power Tool usage and Manufacturing Resource Planning. This training is designed to improve production efficiency, product quality and safety.

### **Certified Safety Training**

1. OSHA 10/30: This training is a series of courses “bundled” by industry sector and occupation. It consists of 10 hours of classroom or CBT training for journey-level workers and 30 hours for frontline supervisors. The coursework is geared to construction work and manufacturing. Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA. OSHA 10 will be provided to frontline Supervisors, Production Staff, Glaziers, Shipping/Receiving, and Construction Laborers. OSHA 30 training will be provided to Managers/Supervisors and Engineers to ensure a safe work environment.
2. Hazardous Waste Operations and Emergency Response Standard (HAZWOPER): This training is also a series of courses specifically designed for workers who handle hazardous substances as first-responders, or clean-up as needed at a hazard disposal or emergency site. It consists of 40 hours of classroom or CBT training, for workers stationed at the hazard site; and 24 hours for workers who visit the site (e.g., engineers). Field training is also required, although not funded by ETP. Completion of the training results in a certificate that expands employment opportunities. Each certification requires an 8-hour annual refresher course. This coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.
3. Hazardous Materials (HAZMAT): This training is also a series of courses, specific to industry sectors involved in the transport of hazardous materials. The coursework varies in length depending on the industry and the occupational title, as organized in five levels ranging from “first responder” to “incident commander.” It is generally a minimum of 24 hours with an 8-hour annual refresher, and may be delivered by classroom or CBT. In this proposal, Machinists, Maintenance Repairers, Engineers, Supervisors, Materials Handlers, and Shipping/Receiving staff will receive up to 40 hours of training. Field training may be required, although not funded by ETP. Completion of the training results in a certificate that expands employment opportunities. This coursework is not under Cal-OSHA, but is administered under the Department of Transportation and CalTRANS. There are various certification entities for the coursework and instructors. In this proposal, certification is by the certified trainers.

### **Curriculum Development**

SELACO meets with participating employers to discuss training needs in conjunction with a pre-training structured assessment and screening process. The core curriculum in this proposal has

been developed by SELACO based on industry needs. The curriculum is continually revised according to the demands and feedback of participating companies.

**Trainer Qualifications**

SELACO utilizes a combination of its own highly skilled trainers and outside training vendors. All trainers are experienced course instructors.

**Marketing and Support Costs**

Through networking and interaction of committee members, SELACO maintains numerous relationships with businesses, labor, and economic development agencies to advertise and market their program. SELACO also promotes programs through its work with community organizations (i.e. Community Collaborative Network, the Los Angeles Economic Development Corporation, Chambers of Commerce, and various other sector partnerships).

SELACO has three staff members dedicated to marketing, employer recruitment, scheduling, and ETP administration. SELACO is requesting and staff recommends 8% Support Costs for Job Numbers 1, 2, 3, 5, and 6, and 20% Support Costs for Job Number 4 (Veterans) to assist with recruitment and training assessments.

**Commitment to Training**

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

**RECOMMENDATION**

Staff recommends approval of this proposal.

**ACTIVE PROJECTS**

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0284	\$949,278	10/31/16 – 10/30/18	757	734	TBD

Based on ETP Systems, 26,909 reimbursable hours have been tracked for potential earnings of \$592,064 (62% of approved amount). SELECO anticipates earning of 70%. In addition to manufacturing and construction, this project also included shipping companies and one company that maintains shipping containers for bulk goods. Due to an upswing in the economy, participating employers from the shipping industry were forced to postpone or cancel training in order to meet high demand at the ports. The proposed Agreement has been right-sized.

**PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0124	Statewide	08/03/15 – 08/02/17	\$949,346	\$939,776 (99%)
ET14-0176	Statewide	09/23/13 – 09/22/15	\$1,249,235	\$1,183,621 (95%)
ET13-0119	Statewide	09/01/12 – 08/31/14	\$695,717	\$684,530 (98%)

**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**

- Project Management
- Scheduling, Budgeting, and Cost Controls
- Managing Resources
- Quality Control
- Time Management
- PERT/Critical Path Charts
- Multicultural Organizations
- Change Management
- Communication Skills
- Customer Service
- Increasing Customer Satisfaction
- Goal Setting
- Planning for Results/Decision Making
- Inventory Control
- Negotiation Techniques
- Increasing Productivity and Quality
- Finance Principles
- Sales Skills

**COMMERCIAL SKILLS**

- Estimating
- Surveying
- Land Analysis
- Entitlement Documentation
- Blueprint Reading
- Fundamentals of Construction
- Construction Management

**COMPUTER SKILLS**

- Word Processing (Intermediate/Advanced)
- Data Processing (Intermediate/Advanced)
- Spreadsheets (Intermediate/Advanced)
- Quickbooks, Adobe, Visual Basics, Crystal Reports
- Databases
- Search Engines
- Pivot Tables
- Content Control, Editing
- Queries and Reports
- Cyber Security Issues
- Social Media Marketing
- Address Books, Group Mailings
- Help Desk Support
- Logistics Software

- Project Management Software
- Computer-Aided Design
- Enterprise Resource Planning
- Manufacturing Resource Planning

### **CONTINUOUS IMPROVEMENT**

- Lean Manufacturing/Operations
- 5-S Work Area Organization
- Six Sigma
- Problem Solving
- Flow Charts, Process Analyses, Cause and Effect
- Decision-Making
- Managing Interactions
- Standard Work and Standard Operations
- Takt Times and Cycle Times
- Setup Time Reduction
- Operation Tools and Kaizen
- Supply Chain Elements and Management
- Costs and Analyses
- Manufacturing Resource Planning
- Scheduling and Planning
- Purchasing and Inventory
- Capacity Management
- Time Management
- Basic Logistics Practices
- Logistics Documentation and Terminology
- Terms of Sale
- Import/Export Process Flow
- Frontline Leadership
- ISO9000-9001/AS9100
  - Quality Management Processes
  - Resource Management Processes
  - Needs Assessment
  - Document Control
  - Communication
  - Monitoring and Measurement
  - Data Analysis
  - Planning

### **HAZARDOUS MATERIALS**

- Hazardous Materials for Logistics and Goods Transportation
- Environmental Management of Hazardous Materials and Industrial Waste

### **HAZWOPER**

- HAZWOPER

### **LITERACY SKILLS**

- SMART Goals
- Work Flow and Occupations
- Effective Listening Skills
- Basics of Problem Solving



- Communication Skills
- Reading, Writing, and Speaking English
- English Pronunciation
- Work-Related Vocabulary and Terminology

**MANAGEMENT SKILLS** (Managers/Supervisors only)

- The Lead/Supervisor Role
- Motivating Employees
- Coach and Counseling
- Planning and Controlling
- Decision-Making and Communication Skills
- Understand Work Group Dynamics
- Change Management
- Teambuilding
- Leadership Principles
- Cost Control
- Time Management

**MANUFACTURING SKILLS**

- Programmable Logic Control
- Manufacturing Resource Planning
- Blueprint Reading
- Gauges and Calibration
- Shop Math
- Tolerances and Variance Calculations
- GD&T
- Data Collection and Tolerances
- Operation of Tools and Kaizen Methods
- Elementary Chemical Knowledge
- Types of Materials/Fire Prevention
- Material Handling/Lifting Devices
- Walking/Working Surfaces
- Machinery and Machine Guarding
- Proper Usage of Hand Tools, Power Tools
- Welding, Cutting and Brazing
- Electrical
- Toxic and Hazardous Materials
- Applying 5S to Safety
- Workplace Assessment for Safety
- Ergonomics

**OSHA 10/30** (Certified OSHA Instructor)

- OSHA 10
- OSHA 30

Literacy Training cannot exceed 45% of total training hours per-trainee.  
Safety Training will be limited to 10% of total training hours per-trainee, excluding  
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.

## Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Workforce Development Corporation of CCG No.: ET19-0268  
Southeast Los Angeles County, Inc.

Reference No: 18-0719

Page 1 of 5

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Bodycote

Address: 515 Apra St.

City, State, Zip: Rancho Dominguez, CA 90220

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 10,000

Total # of full-time company employees in California: 250

Company: Cavotec

Address: 5665 Corporate Ave.

City, State, Zip: Cypress, CA 90630

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 1,000

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

Company: Concept Design Products

Address: 5367 Irwindale Ave.

City, State, Zip: Cerritos, CA 91706

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 11

Total # of full-time company employees worldwide: 11

Total # of full-time company employees in California: 11

Company: Dekra-Lite

Address: 5367 Irwindale Ave.

City, State, Zip: Santa Ana, CA 92704

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 35-45

Total # of full-time company employees worldwide: 65

Total # of full-time company employees in California: 65

## Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Workforce Development Corporation of CCG No.: ET19-0268  
Southeast Los Angeles County, Inc.

Reference No: 18-0719

Page 2 of 5

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Denso

Address: 3900 Via Oro Avenue

City, State, Zip: Long Beach, CA 90810

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 552

Total # of full-time company employees in California: 552

Company: I.C.M Installations

Address: 1180 North Fountain Way

City, State, Zip: Anaheim, CA 92806

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 35

Total # of full-time company employees worldwide: 41

Total # of full-time company employees in California: 41

Company: King's Hawaiian Bakery

Address: 19161 Harborage Way

City, State, Zip: Torrance, CA 90501

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 40

Total # of full-time company employees worldwide: 332

Total # of full-time company employees in California: 332

Company: King's Hawaiian Holding Company

Address: 19161 Harborage Way

City, State, Zip: Torrance, CA 90501

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 57

Total # of full-time company employees in California: 57

## Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Workforce Development Corporation of CCG No.: ET19-0268  
Southeast Los Angeles County, Inc.

Reference No: 18-0719

Page 3 of 5

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Lynx Grills

Address: 7300 Flores St.

City, State, Zip: Downey, CA 90242

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 165

Total # of full-time company employees in California: 165

Company: Menemsha

Address: 20521 Earl Street

City, State, Zip: Torrance, CA 90503

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 40

Total # of full-time company employees worldwide: 109

Total # of full-time company employees in California: 66

Company: Mitsubishi

Address: 1822 Reynolds Avenue

City, State, Zip: Irvine, CA 92614

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 289

Total # of full-time company employees in California: 284

Company: Nixon, Inc.

Address: 701 S. Coast Highway 101

City, State, Zip: Encinitas, CA 92024

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 30-40

Total # of full-time company employees worldwide: 250

Total # of full-time company employees in California: 85

## Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Workforce Development Corporation of CCG No.: ET19-0268  
Southeast Los Angeles County, Inc.

Reference No: 18-0719

Page 4 of 5

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: OC 405

Address: 3100 W. Lake Center Dr.

City, State, Zip: Santa Ana, CA 92704

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 15

Total # of full-time company employees worldwide: 56

Total # of full-time company employees in California: 56

Company: Ports America

Address: 2001 John S. Gibson Blvd.

City, State, Zip: San Pedro, CA 90731

Collective Bargaining Agreement(s): International Association of Machinists and Aerospace Workers, Local 1484

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

Total # of full-time company employees worldwide: 15,000

Total # of full-time company employees in California: 571

Company: SSA Terminals/Oakland International Container Terminal, East Gate

Address: 1717 Middle Harbor Rd.

City, State, Zip: Oakland, CA 94607

Collective Bargaining Agreement(s): International Association of Machinists and Aerospace Workers, Local 1484

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

Total # of full-time company employees worldwide: 1,500

Total # of full-time company employees in California: 115

Company: SSA Terminals/Long Beach

Address: 1521 Pier J

City, State, Zip: Long beach, CA 90802

Collective Bargaining Agreement(s): International Association of Machinists and Aerospace Workers, Local 1484

Estimated # of employees to be retrained under this Agreement: 125

Total # of full-time company employees worldwide: 1,500

Total # of full-time company employees in California: 300

**Participating Employers in Retrainee  
Multiple Employer Contracts**

Contractor's Name: Workforce Development Corporation of CCG No.: ET19-0268  
Southeast Los Angeles County, Inc.

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Reference No: 18-0719

Page 5 of 5

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Sunwest Electric Inc.

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Address: 3064 E. Mira Loma Ave.

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City, State, Zip: Anaheim, CA 92806

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Collective Bargaining Agreement(s): No

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Estimated # of employees to be retrained under this Agreement: 40

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Total # of full-time company employees worldwide: 265

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Total # of full-time company employees in California: 265

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**MACHINISTS AUTOMOTIVE TRADES**  
**International Association of Machinists and Aerospace Workers**  
**District Lodge No. 190, Local Lodge No. 1484**

1261 AVALON BOULEVARD • WILMINGTON, CALIFORNIA 90744

(310) 835-6688 • FAX (310) 835-8715  
DUES@IAM1484.ORG

May 4, 2018

Mr. Stewart Knox, Executive Director  
Employment Training Panel  
1100 "J" Street, Fourth Floor  
Sacramento, CA 95814

Dear Mr. Knox:

The purpose of this letter is to express support for the Southeast Los Angeles County Workforce Development Board and their new ETP agreement proposal.

As a Labor Representative on the Southwest Los Angeles County Workforce Development Board, I can attest to their responsiveness to our union and the employers we represent in Southern California. We have worked together on the development of training programs for our members at companies such as SSA Terminals, Ports America, and International Transportation Services and we look forward to several future training projects.

This ETP agreement will allow the SELACO WDB to reach out to both the small and the large employer, making sure that they are better able to meet the challenges of emerging technologies, limited resources and out of state and off shore competition.

The Southeast Los Angeles County Workforce Development Board operates its programs in collaboration with organized labor. I fully support their efforts.

Sincerely,

Kevin J. Kucera  
Area Director, Business Representative  
Machinists Automotive Trades District Lodge No. 190  
Local Lodge No. 1484

cc: Jim Beno, Directing Business Representative, District No. 190  
Gary Allen, General Vice President, Western Territory  
File



**Training Proposal for:  
Alameda County Electrical Industry Apprenticeship and  
Training Trust**

**Agreement Number: ET19-0927**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** San Francisco Bay Area

**Analyst:** C. Hoover

**PROJECT PROFILE**

Contract Attributes:	Retrainee Apprenticeship Veterans Priority Rate	Industry Sector(s):	Construction (C)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Alameda	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No International Brotherhood of Electrical Workers Local 595		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	N/A		

**FUNDING DETAIL**

<b>Program Costs</b>	+	<b>Support Costs</b>	=	<b>Total ETP Funding</b>
\$650,400		\$45,180 8%		\$695,580

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

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Journeyman Priority Rate	Business Skills, Comm'l Skills, Computer Skills, OSHA 10/30	100	8-200	0	\$667	\$22.77
				Weighted Avg: 24			
2	Retrainee Apprentice	Commercial Skills, OSHA 10/30	130	8-210	0	\$4,492	\$22.77
				Weighted Avg: 200			
3	Retrainee Veterans Apprentice	Commercial Skills, OSHA 10/30	10	8-210	0	\$4,492	\$22.77
				Weighted Avg: 200			

**Minimum Wage by County:** SET/Priority Industry: \$22.77 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  
 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
Journeyman Inside Wireman		100
Apprentice Inside Wireman		130
Veteran Apprentice Inside Wireman		10

**INTRODUCTION**

The Alameda County Electrical Industry Apprenticeship and Training Trust (Alameda Electrical Trust) ([www.595jatc.org](http://www.595jatc.org)) is a joint labor-management organization between the Northern California Chapter, National Electrical Contractors Association and the Local 595 International Brotherhood of Electrical Workers. Founded in 1946, the Trust provides funds for training in electrical-inside wiring for Apprentice, Pre-Apprentice and Journeyman.

The Board of Trustees is comprised of four labor representatives and four management representatives (an estimated 214 employers). The same composition is true for the Alameda County Electrical Joint Apprenticeship and Training Committee (JATC), sponsor of the program. The school is located in San Leandro, California and Chabot College is the LEA for the JATC. The Trust currently serves approximately 220 Apprentices, 1,652 Journeymen, and 30 Pre-Apprentices.

### **Veterans Program**

The Veteran training curriculum will be the same as Apprentice training outlined below. The Alameda Electrical Trust is committed to training 10 veterans to support job-related training that helps them transition into California's workforce. It recruits veterans in cooperation with Helmets to Hardhats, (<http://www.helmetstohardhats.org>), a national joint-labor-management program that recognizes the link between skills acquired in military service and the building trades. Veterans who apply for an apprenticeship at the Alameda Electrical Trust can skip the first stage of the application process (the written assessment) and go directly to the second stage (the interview).

### **Employer Demand**

In 2017, the JATC graduated 33 Apprentices and in 2018 it plans to graduate 37.

ETP funding will expand and upgrade the Alameda Electrical Trust's program. Training on new green-training topics that help employers meet new state-energy-efficiency goals and employer-driven certification classes such as passing Green audits, NFPA-70 E (National Fire Protection Association), Arc Flash, and Building Automation Lighting and Plug Load Systems will be delivered. In addition, certification classes require new classroom training equipment such as Automated Demand Response electrical equipment used to lower energy consumption remotely and such as Building Automation System (BAS) lab equipment is needed to stay current.

The Alameda Electrical Trust reports that the following projects are driving employer demand:

- Dublin's Kaiser Permanente Hospital / Medical Offices (2017-2019)
- Oakland's Lakehouse Commons (361 Residential Units near Lake Merritt)
- Hayward's Lincoln Landing (476 Residential Units and 80,500 sqft. of retail)
- South Hayward's SoHay (25-acre project with 472 Housing Units)

This is Alameda Electrical Trust seventh ETP Agreement, and the fifth within the last five years.

### **Apprenticeship Program**

The Panel is authorized to fund Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). ETP funding is designed to supplement cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. Depending on the type of trade, apprenticeship programs vary in length. In this case the program is five years.

For the building trades, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by \$5, reducing the priority industry rate from \$26 to \$21 per class/lab hour. The ETP wage for Apprentices is no less than \$22.77 per hour. However, the actual wages paid are shown in the Training Plan Table for the Panel's information.

## **PROJECT DETAILS**

### **Training Plan**

#### **Journeyman Training**

**Commercial Skills:** Journeyman training will cover energy-efficient technologies and products such as green building materials, solar photovoltaic panels, new motor controls, advanced welding, green-materials testing and audit equipment. Green training is expected to be the centerpiece of the program because of Title 24 and the demand it creates for energy-efficient construction methods and technologies for participating employers and property owners such as passing Green audits, NFPA-70 E (National Fire Protection Association), Arc Flash and Building Automation Lighting and Plug Load Systems.

The Alameda Electrical Trust is constantly refining and adding to its curriculum to meet changing technology and modernization occurring in the electrical industry. Such as, the shift from analog to digital equipment dictates the need for extensive training. Further, OSHA requires employee training and sets the standards but does not offer the specifics needed. Thus, the NFPA-70E safety class is needed and is the definitive "how to" guide to meet (electrical-safe) work standards set by OSHA. NFPA 70E training is created from the document titled Standard for Electrical Safety in the Workplace published by the National Fire Protection Association (NFPA).

**Business Skills:** Training will enable Journeyman electricians to better understand and follow Title 24's regulations, new national and state building codes, green practices and certification guidelines. This training is needed to assist electricians to: use more collaborative bidding and project development practices; meet budgets; interact with other types of construction workers and implement green solutions in traditional work environments. Further, training will give trainees the latest tools to plan, organize and manage their construction projects so that they can complete projects efficiently and on time. Training will also include team building and leadership.

**Computer Skills:** Training will include scheduling, planning and modeling software. AutoCAD and Job Tracking applications will provide trainees with the tools to modify blueprints, look up project requirements, build budgets and timelines, design virtual buildings, and adjust computerized control systems.

**OSHA 10/30:** This training is not required as a condition of doing business in California. However, the coursework must be approved by and the instructors must be certified by Cal-OSHA. The vendor must also have a certified instructor present to confirm attendance.

#### **Apprenticeship Training**

**Commercial Skills:** Inside Wireman apprentices work directly under the supervision of a qualified Journeyman electrician to install or maintain a variety of approved wiring methods for distribution of electrical light, heat, power, radio and signaling utilization systems in existing or new buildings. This includes street and highway lighting, traffic signal and other outdoor above and below grade installations. Apprentices must learn to install, maintain and repair various types of electrical and electronic equipment in commercial, industrial and residential establishments. Training will also include how to install, connect and test electrical-wiring systems for lighting, heating, air conditioning, and communications in any building or structure.

## **Certified Safety Training**

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

Journeyman and Apprentice electricians (and related occupations) may work under extremely dangerous conditions and on tight timelines. Thus, there is the potential for injury to themselves and other people in the work area vicinity. Participating employers and property owners may need trainees to undergo additional training to ensure that they can perform their work safely.

## **Curriculum Development**

Alameda Electrical Trust uses the National Joint Apprenticeship and Training Committee’s Curriculum for its apprenticeship program, which was developed for the exclusive use of IBEW-NECA JATC’S. The Journeyman curriculum meets the needs of the participating employers, because it is employer driven and based on feedback directly from employers. In addition, the curriculum is reviewed by union representatives of the JATC. Revisions and updates are made based on workplace performance, requests of customers, needs of the local-electrical industry, and course evaluations completed by all trainees.

## **Marketing and Support Costs**

Alameda Electrical Trust requests, and staff recommends, 8% in support costs to fund its staff for recruiting and qualifying additional participating employers for this program. These efforts include direct mailings, informational flyers, personal contacts, telephone calls, public service announcements, emails, and the web. Apprenticeship application announcements are disseminated to local, state and federal agencies as well as to local high schools, community colleges, and community-based organizations. Staff also participates in local job fairs.

While many participating employers have already been recruited, additional recruitment and assessment activities with employers must occur to support apprenticeship and journeymen training. Alameda Electrical Trust agrees to cover any additional costs which exceed the ETP support costs.

## **Commitment to Training**

Signatory employers will continue to make contributions to the training trust for every hour worked by Apprentices and Journeymen. General safety training is, and will continue to be, provided by participating employers in accordance with all pertinent requirements under state and federal law.

### ➤ Training Infrastructure

The Alameda Electrical Trust’s dedicated administrator for this project is its Training Director who will have five Administrative Staff in the JATC office to assist with the marketing, recruitment, needs assessments and scheduling of training. The JATC has one full-time and 31 part-time trainers who will deliver the training. The trainers are former or current members of the trade and experts in the subject matter. Strategy Workplace Communications (along with California Labor Federation) will assist with administrative duties. Training will be delivered by in-house experts.

## **Impact/Outcome**

Alameda Electrical Trust will offer certification classes on topics such as ESAMATC -- Energy Storage and Microgrid Training Certification (new), Green Audits, Arc Flash Safety Awareness, OSHA 10, OSHA 30, Building Automation Systems, and CALCTP Lighting, CALCTP Acceptance Testing, Title 24 Lighting Installation and Codes.

## **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 Alameda Electrical Trust under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0924	501,200	1/27/17 – 1/26/19	279	273	54

Based on ETP Systems, 28,689 reimbursable hours have been tracked for potential earnings of \$424,082.70 (85% of approved amount). The Contractor projects final earnings of 98% based on training currently committed to by employers and in progress through October 2018.

## **PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0908	San Leandro	9/8/15 – 9/7/17	\$492,740	\$484,316 (98%)
ET14-0912	San Leandro	3/3/14 – 3/2/16	\$358,107	\$358,107 (100%)
ET13-0914	San Leandro	10/22/12 – 10/21/14	\$354,796	\$320,451 (90%)

## **DEVELOPMENT SERVICES**

California Labor Federation (CalFED) in Sacramento and Strategy Workplace Communications in Burlingame assisted with development at no cost.

**ADMINISTRATIVE SERVICES**

Strategy Workplace Communications will also perform administrative services for an amount not to exceed 13% of payment earned.

**TRAINING VENDORS**

N/A

**Exhibit B: Menu Curriculum**

**Class/Lab/E-Learning Hours**

8 – 200 (Job Number 1)

Trainees may receive any of the following:

**Journeyman**

**COMMERCIAL SKILLS**

Codeology

- National Electrical Code
- Other Recognized Standards (Installation Changes)
- Plan, Build and Use
- Related Standards (Mandatory and Permissive Rules)
- Special Occupancies and Equipment
- Arc Flash

Analog/Digital Circuit Principles

- Math for Electricians
- Ohm's Law
- Generators
- Inductance/Reactance
- Series/Parallel Circuits

Grounding

- Grounding and Bonding
- National Electrical Code Article 100-Definitions and Provisions
- National Electrical Code Article 110-Requirements
- National Electrical Code Article 90-Introduction
- National Electrical Code Article Chapters 1-4
- Significant Changes to National Electric Code

Fire Alarm Systems and Installations

- Definitions and Systems
- Initiating Devices and Notification Systems
- National Electrical Code and Installation Requirements
- Start Up and Check Out Procedures
- National Fire Protection Act, 1972 (NFPA 72)

Fire Life Safety

- National Electrical Code (Relating to Fire Alarms)
- National Electrical Code Article 725
- National Electrical Code Article 760
- NFPA 72
- Principles of Electronics

### Industrial Motor Control

- Control Relays and Timers
- Jogging and Plugging Controls
- Manual Starters and Magnetic Coils
- Push Buttons, Selector Switches, and Mechanical Devices
- Solid State Electronic Devices
- Variable Frequency Drives

### Programmable Logic Control

- Developing Ladder Programming
- Introduction to Programmable Equipment
- Programming Programmable Logic Controllers
- Using Timers and Counters in Logic Programs
- Writing a Program

### Electrical Design

- 3 and 4-Way Switching
- Design of Electrical Circuits
- Magnetic Motor Control and the Code
- LonWorks and Building Automation
- Transformers and the Code

### Voice, Data and Video

- Audio Distribution
- CCTV Security Surveillance
- Computer Networking
- Fiber Optics
- Telephonic Interconnect

### Industry Specific Skills

- Advanced Instrumentation and Motor Controls
- Advanced Welding
- Architecture Designs and Advanced Plan Reading
- Blueprints and Schematics
- Building Automation Systems
- Conduit Bending
- Confined Space Entry
- Energy Storage and Microgrid Training Certification
- Firestop Installation
- Management and Monitoring of Materials
- Programmable Logic Controllers
- Proper Equipment Set-Up (Green Training)
- Proper Installation & Use of Testing & Auditing Materials & Equipment (Green Training)
- Rigging and Lifting
- Safe Working Practices
- Solar Panel Installation
- Solar Photovoltaics



- Specialized Tools
- Testing Materials and Equipment – Proper Set-Up and Use (Green Training)
- Understanding Changes to Industry Standards (Green Training)
- Understanding New Technologies and Changes to Industry Standards (Green Training)
- Work Flow and Resources

#### California Advanced Lighting Control Program

- Advanced Lighting Control Systems
- Lighting Control Strategies
- Line Voltage Switching Controls
- Low Voltage Switching Control
- Dimming Controls
- Occupancy Sensors
- Photosensors

#### CALCTP Acceptance Testing

#### Electric Vehicle Infrastructure Training Program

### **BUSINESS SKILLS**

- Teambuilding Skills
- Green Awareness Training and Green Certifications
- Leadership Skills
- Customer Service Skills
- Conflict Resolution
- Problem Solving
- Decision Making Skills
- Inventory Checklist
- Advanced Time Management
- Filling Out Work Documents and Reports Accurately
- Project Management
- Creating Project Bids

### **COMPUTER SKILLS**

- Auto Computer-Aided Design
- Job Tracking System
- Scheduling & Planning Jobs

### **OSHA 10/30** (OSHA Certified Instructor)

- OSHA 10
- OSHA 30

**Class/Lab/E-Learning Hours**

8 - 210 (Job Numbers 2 &amp; 3)

**Apprentice****COMMERCIAL SKILLS**

## 2nd Year

- Orientation, Level II
- Test Instruments, Level I
- Codeology, Level I
- AC Theory, Level I
- Blueprints, Level I
- Electrical Safety-Related Work Practices, Level I
- Transformers, Level I
- Application #5: Conduit Bending
- Application #6: Conduit Bending
- Application #7: Comb. Circuit Wiring
- Application #8: Transformer Connections

## 3rd Year

- AC Theory
- Blueprints
- Code and Practices
- Electrical Safety-Related Work Practices
- Fire Alarm Systems
- Grounding and Bonding
- Transformers
- Conduit Bending: Rigid & EMT, Chicago & 555
- Lighting Control Panels
- Motor Controls: Relays & Start / Stop
- Cad-welding
- Ground Testing
- Transformer wiring
- CPR/First Aid refresher
- COMET

## 4th year

- Blueprints (& layout yard)
- Code Calculations
- Code Prep
- Energy Storage and Microgrid Training Certification
- Grounding and Bonding
- Lighting Essentials
- Lightning Protection
- Motor Control
- Motor control Labs
- Motor Controls: Mag Starter & 3-Wire Control
- Motors

- PLC's
- VFD's

#### 5th Year

- Code and Practices
- Code Calculations
- Motor Control
- Orientation
- Rigging
- Torque
- PV/Solar Installer
- CALCTP
- EVITP
- CPR/First-Aid Refresher
- Foreman Training: Managing the Work including NECA/IBEW Presentations

#### **OSHA 10/30** (OSHA Certified Instructor)

- 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 Job Number 1 (Journeyman) training is capped at 200 total training hours per trainee, regardless of the method of delivery. Reimbursement for Job Numbers 2 & 3 (Apprentice) training is capped at 200 total training hours per trainee in Commercial Skills and 10 hours of OSHA for a total of 210 hours, regardless of the method of training delivery.



**Training Proposal for:**

**Bay Area Counties Roofing and Waterproofing Industry  
Apprenticeship Training Fund**

**Agreement Number: ET19-0924**

**Panel Meeting of:** September 28, 2018

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

**PROJECT PROFILE**

Contract Attributes:	Retrainee Apprenticeship Priority Rate Veterans	Industry Sector(s):	Construction Green Technology  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Alameda, Contra Costa, Lake, Marin, Mendocino, Monterey, Napa, San Benito, San Francisco, San Mateo, Santa Clara, Santa Cruz, Solano, Sonoma	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No   United Union of Roofers, Waterproofers, and Allied Workers Locals 40, 81 and 95		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	N/A		

**FUNDING DETAIL**

<b>Program Costs</b>	+	<b>Support Costs</b>	=	<b>Total ETP Funding</b>
\$887,952		\$61,434 8%		\$949,386

<b>In-Kind Contribution:</b>	<b>50% of Total ETP Funding Required</b>	<b>Inherent</b>
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Apprentice Priority Rate Retrainee	Commercial Skills, Computer Skills, OSHA10/30	270	8-210	0	\$2,919	\$22.77
				Weighted Avg: 130			
2	Apprentice Veteran Retrainee	Commercial Skills, Computer Skills, OSHA10/30	10	8-210	0	\$2,919	\$22.77
				Weighted Avg: 130			
3	Journeyman Retrainee	Commercial Skills, Computer Skills, OSHA10/30	198	8-200	0	\$667	\$22.77
				Weighted Avg: 24			

**Minimum Wage by County:** All Job Numbers (SET/Priority Industry): \$22.77 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 \$5.69 per hour may be used to meet the Post-Retention Wage for Job Numbers 1 & 2.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Apprentice and Veteran Roofer		280
Journeyman Roofer		198

\*The wage range for Journeymen is due to various wage rates by geographic region and local unions.

**INTRODUCTION**

The Bay Area Counties Roofing and Waterproofing Industry Apprenticeship Training Fund (Bay Area Roofers) (<http://rwprogram.com/>) is a joint trust serving three apprenticeship programs. It is funded through collective bargaining between signatory employers with the Associated Roofing Contractors of the Bay Area Counties, Inc., and three union locals of the United Union of Roofers, Waterproofers, and Allied Workers:

- Local 40 West Bay Counties
- Local 81 East Bay & North Bay Counties
- Local 95 Santa Clara Counties

Each union local has its own collective bargaining agreement and its own Joint Apprenticeship Training Committee (JATC). Each JATC sponsors an apprenticeship program approved by the Division of Apprenticeship Standards (DAS).

Training is delivered through a joint JATC that was established in 1960: Bay Area Roofing and Waterproofing Industry Joint Apprenticeship Training Committee (Bay Area Roofers JATC). The Bay Area Roofers JATC is responsible for training approximately 660 Apprentices and 1,470 Journeymen in 14 Northern California Counties. This will be the Panel's fifth Agreement with this joint JATC and will be the first time it has a defined cohort of Veteran Apprentices (Job Number 2) to track this JATC's long-time commitment to training Veterans.

### **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 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 42 months.

For the building trades, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by \$5, reducing the priority industry rate from \$26 to \$21 per hour. The ETP wage for all trainees is no less than \$22.77 per hour, tracking the statewide Special Employment Training wage as modified for priority industries. The actual wages paid are shown in the Training Plan Table for the Panel's information.

### **Veteran Apprentice**

The JATC is committed to supporting job-related training that helps Veterans transition into California's workforce. It recruits Veterans in cooperation with Helmets to Hardhats, (<http://www.helmetstohardhats.org>), a national joint labor-management program that recognizes the link between skills acquired in military service and the building trades. Further, Bay Area Roofers JATC works directly with local groups such as the Trades Orientation Program <http://wpusa.org/programs/top/> by assisting in mock interviews and instructional assistance.

## **PROJECT DETAILS**

### **Employer Demand for Training**

Demand in the San Francisco Bay Area for roofers is strong. Employment is at 100%, many roofers are working overtime, and contractors are projecting demand for more workers in the near future. Work hours are up substantially, and some contractors have said a shortage of workers may force them not to bid on new contracts. For this reason, the JATC is expanding the number of apprentices by 7% annually. Among the projects in the Bay Area that are putting roofers to work are: the San Francisco Airport expansion, the Warriors basketball stadium, the Marin Civic Center, Park Merced, and UCSF Medical Center to name a few.

### **Green Technology and New Systems**

Bay Area Roofers JATC focuses its training on meeting changing employer and industry demands. Today's roofing systems include a variety of single ply systems and modified roofing systems (mopping, torching, primed, adhesives, hot rubber, and peel-n-stick). There are new

waterproofing systems, photovoltaic systems, vegetative roofs, and rainwater harvesting systems. These new products and green building systems require skills training on new materials, processes, and new equipment such as electronic leak/failure detection. Thus, there are increasing demands for advanced math skills due to energy efficiency calculations and other new system assessments.

Green roofs are not easily replaced once installed, which requires enhanced failure detection devices. They also require alternative maintenance procedures that will not disrupt the green function of the roofing system, and pose safety hazards not found on conventional roofs. This training will address all of these changes.

## Training Plan

The JATC operates a training facility in Livermore. This facility is a 9,600 square-foot building constructed with additional contributions by signatory employers. The facility enables delivery of RSI in a simulated laboratory environment. The expanded facility also allows instructors to use actual roofing materials and a multitude of new systems used in the construction industry.

The simulated laboratory environment is being used to deliver 60% of training for second-year Apprentices and 90% of training for third-year Apprentices. Bay Area Roofers JATC has also transitioned from after-work and weekend sessions to weeklong blocks of training, which has proven to be a more effective method for the roofing trades. Trainers are experienced journey level workers who have experience working in the trade and formal instruction in training methods and subject matter.

**Commercial Skills:** Apprentices will receive training on topics that include an introduction to the roofing and waterproofing industry, commonly used materials in the industry, built-up roofing, waterproofing and damp proofing, cold applied roofing and caulking, rigid roofing, asphalt and wood shingles, roofing plans and specifications, single ply systems, metal roofing, maintenance and repair, green roofs, solar systems, and rain water harvesting.

Journeymen will receive training in specialty skills covering products and materials that are new to the industry and products and skills that have been in use, but which were not taught during the journeyman's apprenticeship. Training includes advanced use of single ply materials and systems, advanced waterproofing systems, complex maintenance and repair procedures, project planning and coordination, installation and maintenance of drainage systems, application of Title 24 standards, special safety procedures for working around photovoltaics and other "green" roofs, and rain water harvesting systems.

**Computer Skills:** Training will be offered to all occupations in computer software programs available while on the job. Apprentices will receive training in construction-related planning and modeling software applications. Journeymen will learn advanced computer skills, including building information modeling, product application and testing, estimating and project management software.

## Certified Safety Training

**OSHA 10/30:** Journeymen and Apprentices may receive OSHA 10/30. This training is a series of courses "bundled" by industry sector and occupation. Completion of the training results in a certificate that expands employment opportunities. Typically, OSHA training is delivered to workers in the building trades. This training is not required as a condition of doing business in California. 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 for Journeymen and Apprentice training include OSHA 10/30, fall prevention, scaffold safety, torch application, rigging and signaling, handling hazardous materials, traffic flagging, and specialized training for manufacturing and health care. For example, infection risk control assessment training is now required for roofers and other construction workers who work in hospitals and surgical centers. This training helps prevent workers from bringing infections into those facilities.

## **Curriculum Development**

Bay Area Roofers works directly with unions and management to update RSI for Apprentices, and to offer upgrade training for Journeymen. The training curricula are developed by the roofing industry with national and local input. Updates to the RSI curriculum are reviewed and approved by DAS as necessary.

The JATC also conducts assessments and solicits trainee feedback at the conclusion of each course. Trainees are encouraged to report to the training center on their success in using skills to obtain work. Signatory employers may also provide feedback on the need for new training and the effectiveness of current course offerings.

## **Marketing and Support Costs**

Associated Roofing Contractors of the Bay Area Counties represents employers in this project. Employers are notified of training through the association web site, mailings, and presentations. Employers participate as members of the joint committee that operates the program, and training is designed around their needs and the general needs of the industry. Marketing also includes emails to employers, local unions and roofing material representatives.

Bay Area Roofers JATC requests, and staff recommends, 8% support costs to assist in Apprentice and Journeymen recruitment, employer outreach, and assessment of employer-specific job requirements. These activities will take place throughout the Agreement.

## **Electronic Record Keeping**

Staff has approved the Bay Area Roofers use of a Learning Management System for recordkeeping.

## **Commitment to Training**

Employers will continue to make contributions to the JATC training trust for every hour worked by Apprentices and Journeymen. General safety training is provided by the signatory employers in accordance with all pertinent requirements under state and federal law.

### **➤ Administrative Infrastructure**

Administration will be performed in a partnership between the JATC and Steve Duscha Advisories. Class scheduling and completion of training rosters will be the role of JATC staff. Steve Duscha Advisories will assist in employer liaison, documentation of work hours, uploading training and enrollment data to ETP online systems, and meeting ETP reporting and related monitoring activities.



**RECOMMENDATION**

Staff recommends approval of this proposal.

**ACTIVE PROJECTS**

The following table summarizes performance by the Bay Area Roofers under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0926	\$448,875	1/27/2017-1/26/2019	300	386	0

Based on ETP Systems as of 8/2/18, 27,038 reimbursable hours have been tracked to support earnings of \$393,108 (87%). The remaining hours will be uploaded prior to the Panel meeting. The Contractor projects final earnings of 100% as all trainees are working and in retention.

**PRIOR PROJECTS**

The following table summarizes performance by the Bay Area Roofers under an ETP Agreement completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0904	Livermore	9/28/2015-9/27/2017	\$299,250	\$299,250 (100%)
ET14-0913	Livermore	3/3/2014-3/2/2016	\$299,250	\$298,998 (99%)
ET12-0349	Livermore	6/30/2012-6/29/2014	\$482,120	\$232,809 (48%)

ET12-0349: Poor performance was due to less demand for roofers in the Bay Area than originally anticipated. Roofing takes place at the end of construction, so on-the-job hours lagged behind the other building trades. Thus, lower retention prevented the JATC from earning the full Agreement amount. Members are now experiencing full employment.

**DEVELOPMENT SERVICES**

Steve Duscha Advisories in Sacramento assisted with development for a flat fee \$10,000.

**ADMINISTRATIVE SERVICES**

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

**TRAINING VENDORS**

N/A

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

8 - 210 (Jobs 1 &amp; 2)

Trainees may receive any of the following:

**COMMERCIAL SKILLS**

- ✚ Asphalt and wood shingles
- ✚ Batten seam roofing
- ✚ Bermuda and shingle panel
- ✚ Blueprint reading
- ✚ Built-up roofing materials
- ✚ Cold applied roofing and caulking
- ✚ Common roofing materials
- ✚ Ethylene propylene diene monomer (EPDM) single ply roofing
- ✚ Flashing materials
- ✚ Flat seam roofing
- ✚ Following plans and specifications
- ✚ Following project plans
- ✚ Green roofs
- ✚ Hot air welding for apprentices
- ✚ Infection risk control assessment
- ✚ Insulation materials
- ✚ Low slope roofing
- ✚ Maintenance and repair
- ✚ Measurement and calculation problems in roofing
- ✚ Metal roofing
- ✚ Mopping operations
- ✚ Rainwater harvesting systems
- ✚ Regulations governing roofing and waterproofing
- ✚ Rigging and hoisting
- ✚ Roof pumps and tankers
- ✚ Roof surfacing and sealing
- ✚ Roofing tools
- ✚ Safe working procedures for roofers and use of safety equipment
- ✚ Single ply roofing
- ✚ Single ply roofing materials
- ✚ Single ply roofing systems
- ✚ Solar systems
- ✚ Specialty tile
- ✚ Standing seam roofing
- ✚ Steep slope roofing
- ✚ Types of rigid roofing
- ✚ Ventilation
- ✚ Waterproofing and below grade materials
- ✚ Waterproofing and damp proofing
- ✚ Working with concrete and mission tile

**COMPUTER SKILLS**

- ✚ Computer operations for construction
- ✚ Construction modeling

**OSHA 10/30 (OSHA CERTIFIED INSTRUCTOR)**

- ✚ OSHA 10
- ✚ OSHA 30

**Journeyman****Class/Lab Hours**

8-200 (Job 3)

Trainees may receive any of the following:

**COMMERCIAL SKILLS**

- ✚ Advanced concepts in waterproofing and damp proofing
- ✚ Advanced hot air welding
- ✚ Advanced maintenance and repair techniques
- ✚ Advanced single ply roofing
- ✚ Advanced systems of built-up roofing
- ✚ Air barriers for ventilation and heat escape
- ✚ Chemical usage
- ✚ Coordinating plans and schedules with other building trades
- ✚ Creating project plans
- ✚ Creating safe working conditions
- ✚ Designing rigging and hoisting systems and procedures
- ✚ Drainage systems including rain water recovery systems
- ✚ Electronic leak/failure detection
- ✚ Foreman skills, including creating and implementing project plans
- ✚ Green roof specific safety issues
- ✚ Handling pressurized equipment
- ✚ Project management systems
- ✚ Rainwater harvesting systems
- ✚ Rigid roofing
- ✚ Roofing materials
- ✚ Single ply products and uses: advanced course
- ✚ Title 24 energy standards for roofing
- ✚ Torch-on product
- ✚ Vegetative roofs
- ✚ Water proofing on vertical surfaces
- ✚ Wind uplift and load issues related to green roofing
- ✚ Working around hazardous materials
- ✚ Working on scaffolding
- ✚ Working with photovoltaic material

**COMPUTER SKILLS**

- ✚ Advanced use of computers in construction
- ✚ Building Information Modeling (BIM) software
- ✚ Computer skills related to product application and testing

- ✚ Estimating systems
- ✚ Project management software

**OSHA 10/30 (OSHA CERTIFIED INSTRUCTOR)**

- ✚ OSHA 10
- ✚ OSHA 30

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 Numbers 1 & 2 Apprenticeship training is capped at 200 total training hours per trainee in Commercial Skills and 10 hours of OSHA10/30 for a total of 210 hours regardless of the method of training delivery. Reimbursement for Job Number 3 Journeymen retraining is capped at 200 total training hours per trainee regardless of the method of training delivery.



**Training Proposal for:**  
**Chaffey Community College District**  
**Agreement Number: ET19-0239**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** San Diego

**Analyst:** M. Ibarra

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate SB <100 SET HUA	Industry Sector(s):	Manufacturing Transportation/Logistics 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 checked="" type="checkbox"/> Yes <input type="checkbox"/> No Mine, Mineral, & Processing Workers' Union, Local 30; and United Steelworkers Union, Local 5632, District 12		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	≤20%		

**FUNDING DETAIL**

<b>Program Costs</b>	+	<b>Support Costs</b>	=	<b>Total ETP Funding</b>
\$888,598		\$61,356 8%		\$949,954

In-Kind Contribution:	50% of Total ETP Funding Required	\$1,133,820
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Commercial Skills, Computer Skills, Cont. Improv., HazMat, HAZWOPER, Literacy Skills, Mgmt. Skills, Mfg. Skills, OSHA 10/30	845	8 - 300	0	\$945	*\$16.70
				Weighted Avg: 34			
2	Retrainee	Business Skills, Commercial Skills, Computer Skills, Cont. Improv., HazMat, HAZWOPER, Literacy Skills, Mgmt. Skills, Mfg. Skills, OSHA 10/30	103	8 - 300	0	\$1,033	*\$16.70
				Weighted Avg: 42			
3	Retrainee SB <100	Business Skills, Commercial Skills, Computer Skills, Cont. Improv., HazMat, HAZWOPER, Literacy Skills, Mgmt. Skills, Mfg. Skills, OSHA 10/30	40	8 - 200	0	\$834	*\$16.70
				Weighted Avg: 30			
4	Retrainee Priority Industry HUA	Business Skills, Commercial Skills, Computer Skills, Cont. Improv., HazMat, HAZWOPER, Literacy Skills, Mgmt. Skills, Mfg. Skills, OSHA 10/30	10	8 - 200	0	\$1,167	*\$12.53
				Weighted Avg: 42			

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

**Minimum Wage by County:**

**Job Numbers 1 – 3:** \$18.22 per hour for Alameda, Contra Costa, Marin, San Mateo, Santa Clara, and San Francisco Counties; \$17.54 per hour for Los Angeles County; \$17.50 per hour for Orange County; \$17.03 per hour for San Diego County; \$16.80 per hour for Sacramento County; and \$16.70 per hour for all other counties.

**Job Number 4 (HUA):** \$13.67 per hour for Alameda, Contra Costa, Marin, San Mateo, and Santa Clara Counties; \$15.00 per hour San Francisco County; \$13.25 per hour for Los Angeles County; \$13.12 per hour for Orange County; \$12.77 per hour for San Diego County; \$12.60 per hour for Sacramento County; and \$12.53 per hour for all other counties.

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

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

Participating employers may use up to \$2.50 per hour of health benefits to meet the Post-Retention Wage.

**Wage Range by Occupation**

Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Numbers 1 - 3</b>		
Administrative Staff		149
Logistics Staff		99
Maintenance Mechanic Staff		73
Industrial Electrical Technician		73
Operator		99
Production Staff		149
Manufacturing Staff		146
Supervisor		100
Manager		100
<b>Job Number 4 (HUA)</b>		
Administrative Staff		1
Logistics Staff		1
Maintenance Mechanic Staff		2
Industrial Electrical Technician		2
Operator		1
Production Staff		1
Manufacturing Staff		2

**INTRODUCTION**

Founded in 1883, Chaffey Community College District (Chaffey) ([www.chaffey.edu](http://www.chaffey.edu)) is a two-year public community college. Chaffey provides training at four campuses in San Bernardino County:

the main campus and headquarters in Rancho Cucamonga; an Information Technology Center in Chino; and two Industrial Technical Learning Centers (InTech) in Fontana.

Chaffey is eligible for ETP funding as a public training agency. This will be the eighth Agreement between ETP and Chaffey, the fifth in the last five years.

In prior ETP projects, Chaffey served and maintained relationships with manufacturing, logistics, distribution, and healthcare industry groups in the Inland Empire (Riverside and San Bernardino Counties), San Diego, eastern Los Angeles, and northern Orange Counties. In this proposal, training will be provided to participating employers located statewide.

Training will target large and small businesses facing out-of-state competition. Training is focused on technical, computer, literacy, quality, leadership, and business skills customized by each participating employer's needs.

## **PROJECT DETAILS**

### **Employer Demand**

Chaffey's involvement with workforce investment boards as well as business advisory and non-profit agency boards affords the College consistent contact with employers from multiple industries, allowing Chaffey to keep abreast of current and changing business needs within industries.

Many Inland Empire employers face an aging workforce, specifically in manufacturing. Employers must hire and retain skilled workers to replace the large number of employees leaving through retirement. Many of these employers prefer to promote from within which opens entry-level positions. Hiring and retaining new workers for these entry-level positions require a significant amount of skills training. Employers report a lack of skilled workers in the Inland Empire able to fill positions.

In addition, manufacturing jobs are high in demand. According to data from a recent Centers of Excellence (COE) 2018 report, an initiative of the California Community Colleges Economic and Workforce Investment program that provides data on critical industries and occupations, indicates that within the Inland Empire's two-county region (Riverside and San Bernardino), there are 4,350 advanced manufacturing businesses that generate \$24B in revenue and provide an estimated 96,519 jobs. The report identified 45 manufacturing occupations within the regions with an expected 2,020 annual openings (new and replacement jobs) over the next year alone.

Chaffey conducted employer needs assessments and considered employment demand projections, ETP-funded training will allow employers to provide the necessary skills training to promote employees and provide technical skills to newly-hired workers including those hired in entry-level jobs. Training will help employers create a high-performance workforce and stimulate and support growth within their organizations.

### **Core Group of Employers**

In this proposal, all participating employers in the core group have been screened for ETP eligibility. These employers have been determined to meet out-of-state competition. Chaffey requests ETP funding for 998 trainees and has current core group demand for 1,584 trainees (more than 100%).



The core group of 34 employers consists of 19 small businesses, 15 large employers across Northern and Southern California, of which, 26 are priority industries.

### **Union Support**

Two of the core group of employers have submitted a letter of support for trainees represented by the following: Mine, Mineral, & Processing Workers' Union, Local 30 (for US Borax, Inc.); and United Steelworkers Union, Local 5632, District 12 (for Vista Metal Corp).

### **Training Plan**

The skills employees gain through ETP-funded training will allow entry-level workers to remain employed while other employees promoted within the Company. Additionally, training will allow employers to continually improve processes, eliminate waste, and compete in the global marketplace.

**Business Skills** – Training topics include Business Impact, Communication Skills, Conflict Management, Customer Service, Decision Making, Finance for Non-Financial Manager, Getting Business Results, Interpersonal Skills, Inventory Control, Negotiation Skills, Product Knowledge, Project Management, Telephone Skills, and Time Management.

**Commercial Skills** – Training topics include Advanced Math Skills, Automotive Repair, Analog Communications, Cable Networking, Control Systems Technology, Conventional Machining, Copper and Plastic Piping Practices, Fiber Optic Cabling, Forklift Training, HVAC, Hydraulics, Industrial Electrical, Industrial Mechanical, Mechatronics, Machining, Preventative and Predictive Maintenance, Semiconductor Devices, Transistor Circuits, Trenching and Shoring, Valves, and Welding.

**Computer Skills** – Training topics include AutoCAD, Company-Specific Software, Computer Networking, Cost Tracking, Cloud-Based Training, Document Control, Managing E-mail, Manufacturing/Material Resource Planning, Microsoft Office (Intermediate & Advanced), MS Project, Inventory Control, Payroll, Purchase Order Tracking, SolidWORKS, and World-Wide Web.

**Continuous Improvement** – Training topics include 5S, Basic Logistics Standard Practices, Black Belt Certification, Certified Logistics Associate/Technician, Change Management, Coaching/Motivating Employees, Communicating Effectively, Cost and Analysis, Cost Reduction, Green Belt Certification, Interaction Management, Inventory Control, Leadership Skills for Frontline Workers, Lean Manufacturing/Operations, Problem Solving, Process Corrective Action, Quality Technician Certification, Resource Management Certification, Scheduling and Planning, Six Sigma, Strategic Planning, Supervisor/Lead Role, Supply Chain Elements, Teambuilding, Total Quality Management, Understanding Work Group Dynamics, and Yellow Belt Certification.

**Literacy Skills** – Training topics include Basic Math, Language Comprehension, Reading Letters & Reports, Understanding Numbering Systems, Understanding Verbal Direction, Workplace English (Vocational English), Shop/Workplace Math, and Writing Letters & Reports.

**Management Skills** (for management trainees only) – Training topics include Basic/Advanced Supervisory and Management Skills, Conflict Management for Managers, Essential Interviewing Skills, Leadership for Managers, Managing a High Performance Workplace, Planning for Managers, and Project Management for Managers.

**Manufacturing Skills** – Training topics include Assembly Procedures, Cross-Functional Production/Equipment Skills, Equipment Operation, Food Processing, Manufacturing Practices, Non Destructive Testing, Production Operation, Warehousing, Blueprint Reading, Geometric Dimensioning & Tolerancing, Inspection Techniques, CNC Machining, and Prototyping.

### **Certified Safety Training**

#### **Hazardous Materials (HAZMAT)**

This training is a series of courses, specific to industry sectors involved in the transport of hazardous materials. The coursework varies in length depending on the industry and the occupational title, as organized in five levels ranging from “first responder” to “incident commander.” It is generally a minimum of 24 hours with an 8-hour annual refresher, and may be delivered by classroom or CBT. Field training may be required, although not funded by ETP. Completion of the training results in a certificate that expands employment opportunities. HAZMAT training has oversight by the Department of Transportation (CalTRANS). There are various certification entities for the coursework and instructors.

#### **Hazardous Waste Operations and Emergency Response (HAZWOPER)**

This training is also a series of courses specifically designed for workers who handle hazardous substances as first-responders, or clean-up as needed at a hazard disposal or emergency site. It consists of 40 hours of classroom or CBT training, for workers stationed at the hazard site; and 24 hours for workers who visit the site (e.g., engineers). Field training is also required, although not funded by ETP. Completion of the training results in a certificate that expands employment opportunities. Each certification requires an 8-hour annual refresher course. This coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

#### **OSHA 10/30**

This training is a series of courses “bundled” by industry sector and occupation. It consists of 10 hours of classroom training for journey-level workers and 30 hours for frontline supervisors. It may also be delivered to frontline workers if specifically required by the job order. The coursework is geared to construction work. 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.

The trainer-to-trainee ratio for HAZMAT, HAZWOPER, and OSHA 10/30 can be 1:40.

### **Curriculum Development**

Chaffey’s curriculum development is employer driven to upskill specific occupations and/or drive a high performance workplace culture. The College also meets with business/industry to identify training needs. The expected outcomes aligns with a high-performance workplace in order to meet or exceed employer’s productivity goals.

Chaffey conducts training needs assessment in three ways: surveys with employers via electronic communication, convene with employer advisory group quarterly, and work with individual employers, to develop a two-year training plan. At the completion of training, participants complete a program and instructor evaluation. Any recommendations or issues regarding the programs are discussed at team meetings, vetted with a group of employers, and implemented within the program.

## **Modification to Maximum Training Hours**

Chaffey reports that several manufacturers and logistics companies continue to express a need for Industrial Electrical Technician and Maintenance Mechanic Staff trained in the electrical skills to service manufacturing equipment and machines. The loss in productivity due to down equipment and machinery is significant enough to compel employers to keep on-site, highly-skilled Industrial Electrical Technician or Maintenance Mechanic Staff for immediate repairs, rather than wait for a vendor to send a mechanic out to repair/replace a machine or equipment.

To support the demanding training needs, Chaffey requests to increase the maximum hours from 200 hours to 300 hours. The complete Industrial Electrical and Industrial Mechanical Training courses requires 400 hours of instruction because it is delivered at the intermediate to advanced level and covers numerous topics. If the training were to be delivered only at the ETP maximum 200 hour level, trainees may not be able to adequately maintain, repair, and replace machines in their plant/distribution center. While each trainee already has at least a basic level understanding or experience required to perform other aspects of their position, a more detailed level of skills and knowledge pertaining specifically to Electrical and Industrial Mechanical Training will be delivered.

Chaffey has determined that approximately 13 Industrial Electrical Technician and Maintenance Mechanic Staff trainees will receive up to 400 hours. The increase in the maximum hours from 200 to 300 will allow funding for 75% of training required, per trainee. Any training hours above the 300 hours will be covered by employer in-kind contributions.

The higher number of training hours requested has been deemed reasonable and approved by Panel in two prior contracts.

## **Apprenticeship Evaluation**

The curriculum for the Industrial Electrical Technician and Maintenance Mechanic Staff has been reviewed and compared with Electrical Apprenticeship programs offered through Joint Apprenticeship Training Committees in the Inland Empire (Riverside and San Bernardino Counties). The curriculum does not duplicate courses offered through an established union apprenticeship program offered in these counties.

## **Marketing and Support Costs**

Chaffey advertises and networks through its local Chambers of Commerce; HR Network Group; local Workforce Development Departments for San Bernardino County; local city Economic Development Departments; Inland Empire Desert Regional Consortium; email blasts/phone calls to employer distribution database; and individual meetings with clients. Chaffey also regularly attends Manufacturer's Council of the Inland Empire (MCIE) and the High Desert Manufacturing Advising Council meetings to market training to its members electronically and during the annual MCIE Summit. The College also communicates with the Chancellor's Office Deputy Sector Navigators and Centers of Excellence to leverage their contact with employers to advertise training. Further, the College produces flyers to promote training to current and potential employers, encouraging them to send referrals. Chaffey's website offers training sign-up form, training calendar, and menu curriculum topics.

As previously stated, Chaffey meets with many of the MCIE council members at their facilities to conduct individualized training needs assessments. Marketing and outreach to employers statewide requires the efforts of several staff members to solicit new and maintain ongoing contact with its partners, advisory groups, and employers. Chaffey's Business Liaison has been designated to recruit and assess businesses if they are qualified to receive ETP-funded training, as well as work with local agencies and network groups to present the training programs and services Chaffey offers.

Chaffey is requesting 8% support costs for this proposal to cover the cost of recruiting additional employers, assessing employer-specific job training requirements, and developing a 12 to 24-month training plan for each employer as well as customized training programs for individual employers. Assessment activities and employer recruitment will continue to take place throughout the duration of the contract. Staff recommends approval of 8% for support costs.

### **Commitment to Training**

ETP funds will not displace the existing financial commitment to training of participating employers, in fact, may enhance it. Safety training is, and will continue to be, provided by the participating employers in accordance with all pertinent requirements under state and federal law. Chaffey's participating employers stated that the proposed ETP training is supplementary in nature. Current and on-going training varies by employer but generally consists of new-hire orientation/onboarding, job-specific training, job shadowing (on-the-job training), harassment prevention, diversity, and state and federally mandated training.

In its current project, Chaffey has seen an increase in employer participation in continued training for its employees. Employers share with Chaffey their observations about the effects of training and the desired outcomes of training that transform individuals' attitudes, behaviors, and skills in the workplace. These positive results motivate employers to invest more time, money, and resources into additional training.

#### ➤ Training Infrastructure

Chaffey's Staff will administer the proposed training. There are three fulltime employees responsible for marketing, recruitment, needs assessment, coordinating and scheduling training, submitting invoices, and ensuring compliance with ETP recordkeeping requirements. The College's Director of Economic Development will oversee project activities and manage overall administration of the ETP project including the tracking of potential earnings against total Agreement amount. The infrastructure of a community college setting will continue to allow Chaffey to facilitate effective and efficient business practices.

Chaffey will retain administrative control of all activities associated with any training provided by other training vendors (colleges) including data entry, recordkeeping, and project administration. Specifically, Chaffey will provide each training instructors/vendors with an overview of ETP program guidelines. Further, vendors will be instructed in proper documentation required by ETP including the recording of daily attendance.

Training will commence upon contract approval.

### **Impact/Outcome**

Trainees receive certification of completion upon completing a training program. Dependent on the training program, they may also receive one or more of the following nationally recognized certifications: National Center for Construction Education and Research (NCCER) and

Occupational Safety and Hazard (OSHA). Chaffey's Six Sigma Green Belt Training is aligned with the body of knowledge for the American Society for Quality (ASQ) certification. Trainees are encouraged and provided information on how to apply for the nationally recognized ASQ certification.

### **Trainer Qualifications**

Chaffey's trainers are engaged by the College as industry/subject matter experts. The trainers undergo a vetting/screening interview process by the department staff. Most of the trainers have a minimum of a bachelor's degree, with many having a master's or doctoral degree, along with industry-recognized certifications and credentials. Trainers are also required to have several years of business and industry-related experience.

### **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.

### **High Unemployment Area (HUA)**

Trainees in Job Number 4 work in a High Unemployment Area (HUA). This is a region with unemployment exceeding the state average by 25%, under the Panel's standards. The determination of HUA status is based on unemployment data from the Labor Market Information Division of the Employment Development Department. Participating employer's locations in cities and/or counties in an HUA qualify under these standards.

The Panel may modify the wage for these trainees by up to 25% if post-retention wages exceed the start-of-training wages. Chaffey is requesting this wage modification for trainees in Job Number 4.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **ACTIVE PROJECTS**

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
*ET18-0110	\$949,434	7/1/17 – 6/30/19	2,029	943	0

ETP Online Systems reflect 32,558 reimbursable hours have been tracked for 943 trainees, equating to potential earnings of \$680,931 (72% of Agreement amount). Chaffey anticipates earning 100% of the Agreement amount (\$949,434) based on training currently committed to by employers and in progress through the end of November 2018.

### **PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0196	Various cities in Riverside, San Bernardino, Los Angeles, Orange, and San Diego Counties	9/1/15 – 8/31/17	\$563,564	\$483,754 (86%)
**ET14-0170	Various cities in Riverside, San Bernardino, Los Angeles, Orange, and San Diego Counties	11/1/13-10/31/15	\$1,021,010	\$592,426 (58%)
ET13-0116	Various cities in Riverside, San Bernardino, Los Angeles, and Orange Counties	8/27/12 – 8/26/14	\$650,597	\$647,258 (99%)

\*\*Low performance was due to a leadership transition and shift in the organizational structure of the department soon after approval of the ETP project. As a result, minimal training occurred during the first six months of the contract. New staff's learning curve in marketing and project administration posed additional delays in performance. Since then, Chaffey has developed a dedicated and experienced team processes to ensure success in subsequent ETP Agreements.

### **DEVELOPMENT SERVICES**

N/A

### **ADMINISTRATIVE SERVICES**

N/A

### **TRAINING VENDORS**

To Be Determined

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

Job Numbers 1 & 2: 8 – 300

Job Numbers 3 & 4: 8 – 200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Behavioral Interviewing
- Business Impact
- Communication Skills
- Conflict Management
- Customer Service
- Decision-Making
- Finance for the Non-Financial Manager
- Getting Business Results
- Group Effectiveness
- Interpersonal Skills
- Inventory Control
- Negotiation Skills
- Personal Effectiveness
- Product Knowledge
- Project Management
- Scheduling, Budgeting, and Cost Control
- Telephone Skills
- Time Management

**COMMERCIAL SKILLS**

- Advanced Math
- Automotive Repair
- AC & DC Variable Speed Drives
- Analog Communications
- AVO/High Voltage
- Basic/Intermediate PLCs
- Computer Numerical Control (CNC)
- Cable Networking the Physical Layer
- Control Systems Technology
- Conventional Machining
- Copper and Plastic Piping Practices
- Drills and Related Tools
- Electro-Pneumatics I & II
- Fiber Optic Cabling the Physical Layer
- Forklift Training
- Fasteners and Anchors
- Gaskets and Packing
- Lubrication
- Heaters, Furnaces, Heat Exchangers, Cooling Towers, and Fin Fans
- High Pressure Steam Systems and Auxiliaries

- HVAC EPA 608 & 609
- Hydraulics I & II
- Industrial Electrical
- Industrial Electrical Safety Training
- Industrial Mechanical
- Instrumentation & Process Controls I & II
- Intermediate – Advanced Electricity & Motor Operation for Manufacturing
- Technicians
- Lathes
- Low-Pressure Steam Systems
- Lubrication
- Material Handling & Hand Rigging
- Mechatronics
- Machining
- Mobile and Support Equipment
- Oxyfuel Cutting
- Precision Measuring Tools
- Preventive and Predictive Maintenance
- Pumps and drivers
- Semiconductor Devices
- SMAW-Equipment & Set Up
- Transistor Amplifier Circuits
- Transistor Feedback Circuits
- Transistor Power Amplifiers
- Trenching & Shoring
- Troubleshooting and Repairing Pumps
- Troubleshooting and Repairing Gearboxes
- Troubleshooting Electrical Control Circuits
- Valves
- Welding

### **COMPUTER SKILLS**

- Auto CAD
- Budgeting
- Company-Specific Software
- Computer Networking
- Cost Tracking
- Cloud Based Training
- Document Control
- Managing E-mail
- Manufacturing Resource Planning/Material Resource Planning
- Microsoft Office (Intermediate & Advanced)
- MS Project
- Inventory Control
- Payroll
- Purchase Order Tracking
- Shipping Solutions or Related Logistic Software
- SolidWORKS
- World-Wide Web



**CONTINUOUS IMPROVEMENT**

- 5S
- Basic Logistics Standard Practices
- Black Belt Certification
- Certified Logistics Associate
- Certified Logistics Technician
- Change Management
- Coaching/Motivating Employees
- Communicating Effectively
- Communicating Effectively with ELL (English Language Learners)
- Cost and Analysis
- Cost Reduction
- Green Belt Certification
- Interaction Management
- Inventory Control
- Leadership Skills for Frontline Workers
- Lean Manufacturing/Operations
- Monitoring
- Problem Solving
- Process Corrective Action
- Quality Technician Certification
- Resource Management Certification
- Scheduling and Planning
- Six Sigma
- Strategic Planning
- Supervisor/Lead Role
- Supply Chain Elements
- Teambuilding
- Time Studies & Line Balancing
- TQM – Total Quality Management
- Understanding Work Group Dynamics
- Yellow Belt Certification

**HAZARDOUS MATERIALS (HAZMAT)****HAZARDOUS WASTE OPERATIONS AND EMERGENCY RESPONSE  
(HAZWOPER) – Instructor/s must be certified by Cal-OSHA****LITERACY SKILLS\***

- Basic Math
- Language Comprehension
- Reading Letters & Reports
- Understanding Numbering Systems
- Understanding Verbal Direction
- Workplace English (Vocational English)
- Shop/Workplace Math
- Writing Letters & Reports

\*Literacy Training cannot exceed 45% of total training hours, per trainee.

**MANAGEMENT SKILLS (management trainees only)**

- Basic/Advanced Supervisory and Management Skills
- Conflict Management for Managers
- Essential Interviewing Skills
- Leadership for Managers
- Managing a High Performance Workplace
- Planning for Managers
- Project Management for Managers

**MANUFACTURING SKILLS**

- Assembly Procedures
- Cross-Functional Production/Equipment Skills
- Equipment Operation
- Food Processing
- Manufacturing Practices
- Non Destructive Testing
- Production Operation
- Warehousing
- Blueprint Reading
- Geometric Dimensioning & Tolerancing
- Inspection Techniques
- CNC Machining
- Prototyping

**OSHA 10 (Certified OSHA Instructor)\*\*****OSHA 30 (Certified OSHA Instructor)\*\***

\*\*Safety Training cannot exceed 10% of total training hours, per trainee. This cap does not apply to HAZMAT, HAZWOPER, or OSHA 10/30.

Note: Reimbursement for retraining is capped at 300 total training hours, per trainee, for Job Numbers 1 & 2; and 200 total training hours, per trainee, for Job Numbers 3 & 4, regardless of the method of delivery.

## Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Chaffey College

CCG No.: ET19-0239

Reference No: 18-0472

Page 1 of 8

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Accent Plastics

Address: 1925 Elise Circle

City, State, Zip: Corona, CA 92879

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 15

Total # of full-time company employees worldwide: 62

Total # of full-time company employees in California: 62

Company: Affordable Plastics & Packaging, Inc.

Address: 739 E. Francis St.

City, State, Zip: Ontario, CA 91761

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 5

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

Company: Amcor Rigid Plastics

Address: 14270 Ramona Ave.

City, State, Zip: Chino, CA 91710

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 60

Total # of full-time company employees worldwide: 31,000

Total # of full-time company employees in California: 1000

Company: Barrett Business Services (BBSI)

Address: 3401 Centrelake Dr. Suite 150

City, State, Zip: Chino, CA 91710

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 29,000

Total # of full-time company employees in California: 325

## Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Chaffey College

CCG No.: ET19-0239

Reference No: 18-0472

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Company: Bericap

Address: 1671 Champagne Ave., Suite B

City, State, Zip: Ontario, CA 91761

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 3000

Total # of full-time company employees in California: 55

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Company: California Steel Industries

Address: 1 California Way

City, State, Zip: Fontana, CA 92335

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 980

Total # of full-time company employees in California: 980

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Company: California Tool & Welding Supply

Address: 201 N. Main St.

City, State, Zip: Riverside, CA 92501

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 87

Total # of full-time company employees in California: 87

---

Company: ClosetMaid

Address: 5150 B Edison Ave.

City, State, Zip: Chino, CA 91710

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 41

Total # of full-time company employees worldwide: 950

Total # of full-time company employees in California: 41

## Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Chaffey College

CCG No.: ET19-0239

Reference No: 18-0472

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Company: CustomGoods

Address: 12200 Arrow Rte.

City, State, Zip: Rancho Cucamonga, CA 91730

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 65

Total # of full-time company employees worldwide: 0

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

Company: Damco

Address: 5011 Firestone Pl.

City, State, Zip: South Gate, CA 90280

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 10000

Total # of full-time company employees in California: 50

Company: Domino's

Address: 301 S. Rockefeller Ave.

City, State, Zip: Ontario, CA 91761

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 13

Total # of full-time company employees worldwide: 100

Total # of full-time company employees in California: 100

Company: Elite Comfort Solutions

Address: 1671 S. Champagne Ave.

City, State, Zip: Ontario, CA 91761

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 170

Total # of full-time company employees in California: 170

## Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Chaffey College

CCG No.: ET19-0239

Reference No: 18-0472

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Company: Elizabeth Shutters

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Address: 525 S. Rancho Ave.

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City, State, Zip: Colton, CA 92324

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Collective Bargaining Agreement(s): N/A

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

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Total # of full-time company employees worldwide: 45

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

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Company: FabTech

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Address: 4331 Eucalyptus Ave.

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City, State, Zip: Chino, CA 91710

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Collective Bargaining Agreement(s): N/A

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

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Total # of full-time company employees worldwide: 82

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Total # of full-time company employees in California: 82

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Company: Gerard Daniel Worldwide

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Address: 13055 Jurupa Ave.

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City, State, Zip: Fontana, CA 92337

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Collective Bargaining Agreement(s): N/A

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

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Total # of full-time company employees worldwide: 450

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Total # of full-time company employees in California: 85

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Company: H&A Transmissions

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Address: 8727 Rochester Ave.

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City, State, Zip: Rancho Cucamonga, CA 91730

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Collective Bargaining Agreement(s): N/A

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Estimated # of employees to be retrained under this Agreement: 33

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Total # of full-time company employees worldwide: 65

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Total # of full-time company employees in California: 65

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## Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Chaffey College

CCG No.: ET19-0239

Reference No: 18-0472

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Company: Haliburton International Foods

Address: 3855 Jurupa St.

City, State, Zip: Ontario, CA 91761

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 180

Total # of full-time company employees worldwide: 180

Company: Mitsubishi Cement Corporation

Address: 5808 State Hwy. 18

City, State, Zip: Lucerne Valley, CA 92356

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 150

Total # of full-time company employees in California: 130

Company: Monoprice

Address: 1 Point Dr. Suite 400

City, State, Zip: Brea, CA 92821

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 28

Total # of full-time company employees worldwide: 213

Total # of full-time company employees in California: 195

Company: Nestle Waters North America

Address: 14020 Elm St.

City, State, Zip: Cabazon, CA 92230

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 339000

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

## Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Chaffey College

CCG No.: ET19-0239

Reference No: 18-0472

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Company: New Indy Ontario LLC

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Address: 5100 Jurupa St.

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City, State, Zip: Ontario, CA 91761

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Collective Bargaining Agreement(s): N/A

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Estimated # of employees to be retrained under this Agreement: 40

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Total # of full-time company employees worldwide: 104

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Total # of full-time company employees in California: 104

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Company: Nongshim America

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Address: 12155 6<sup>th</sup> St.

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City, State, Zip: Rancho Cucamonga, CA 91730

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Collective Bargaining Agreement(s): N/A

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

---

Total # of full-time company employees worldwide: 380

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Total # of full-time company employees in California: 380

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Company: Shark Ninja

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Address: 16300 S. Fern Ave.

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City, State, Zip: Chino, CA 91708

---

Collective Bargaining Agreement(s): N/A

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Estimated # of employees to be retrained under this Agreement: 15

---

Total # of full-time company employees worldwide: 1120

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Total # of full-time company employees in California: 130

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Spray Enclosure Technologies, Inc.

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Address: 1427 N. Linden Ave.

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City, State, Zip: Rialto, CA 92376

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Collective Bargaining Agreement(s): N/A

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

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Total # of full-time company employees worldwide: 51

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Total # of full-time company employees in California: 51

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**Participating Employers in Retrainee  
Multiple Employer Contracts**

Contractor's Name: Chaffey College

CCG No.: ET19-0239

Reference No: 18-0472

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Company: Trek Bicycle

---

Address: 5100 Shea Center Dr.

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City, State, Zip: Ontario, CA 91761

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Collective Bargaining Agreement(s): N/A

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

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Total # of full-time company employees worldwide: 2500

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Total # of full-time company employees in California: 50

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Company: Total Resources International

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Address: 420 S. Lemon Ave.

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City, State, Zip: Walnut, CA 91789

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Collective Bargaining Agreement(s): N/A

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Estimated # of employees to be retrained under this Agreement: 55

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Total # of full-time company employees worldwide: 81

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Total # of full-time company employees in California: 81

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Company: Tovey Shultz

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Address: 18261 Collier Ave., Unit A

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City, State, Zip: Lake Elsinore, CA 92530

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Collective Bargaining Agreement(s): N/A

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Estimated # of employees to be retrained under this Agreement: 35

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Total # of full-time company employees worldwide: 35

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Total # of full-time company employees in California: 35

---

Company: Transco Northwest

---

Address: 22211 75<sup>th</sup> Ave. S

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City, State, Zip: Kent, WA 98032

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Collective Bargaining Agreement(s): n/a

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

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Total # of full-time company employees worldwide: 40

---

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

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## Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Chaffey College

CCG No.: ET19-0239

Reference No: 18-0472

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Company: Under Armour

---

Address: 2510 W. Walnut Ave.

---

City, State, Zip: Rialto, CA 92376

---

Collective Bargaining Agreement(s): N/A

---

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

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Total # of full-time company employees worldwide: 9500

---

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

---

Company: US Borax

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Address: 14486 Borax Rd

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City, State, Zip: Boron, CA 93516

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Collective Bargaining Agreement(s): ILWU local 30

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Estimated # of employees to be retrained under this Agreement: 40

---

Total # of full-time company employees worldwide: 750

---

Total # of full-time company employees in California: 600

---

Company: Vista Metals

---

Address: 13425 Whittram Ave.

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City, State, Zip: Fontana, CA 92335

---

Collective Bargaining Agreement(s): United Steel Workers of America Local 5632

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

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Total # of full-time company employees worldwide: 271

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Total # of full-time company employees in California: 271

---

Company: Worthington

---

Address: 336 Enterprise Pl.

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City, State, Zip: Pomona, CA 91768

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Collective Bargaining Agreement(s): N/A

---

Estimated # of employees to be retrained under this Agreement: 55

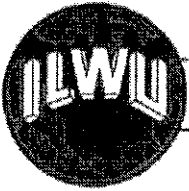
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Total # of full-time company employees worldwide: 11000

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Total # of full-time company employees in California: 212

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## MINE, MINERAL & PROCESSING WORKERS' UNION

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### LOCAL 30

AFFILIATED WITH THE INTERNATIONAL LONGSHOREMEN'S AND WAREHOUSEMEN'S UNION  
24001 CHAPARRAL AVENUE BORON, CALIFORNIA 93516 (760) 762-6151 FAX (760) 762-5542



*Amy Heuvelhorst*  
*Sr. Employee Relations Advisor*  
*U.S. Borax/Rio Tinto Minerals*  
*14486 Borax Rd.*  
*Boron, CA 93516*

July 9, 2018

**RE: Letter of Awareness on Proposed Training**

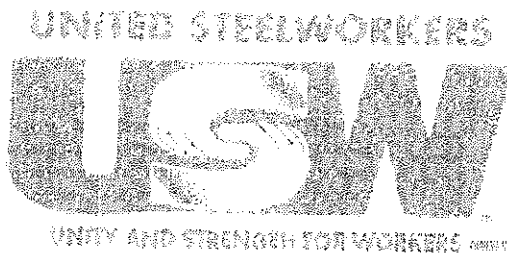
Dear Mrs. Heuvelhorst:

The Union is aware that employees of the Truck-Shop will receive training funded through the Employment Training Panel and we concur with the proposed training.

Sincerely,

A handwritten signature in black ink, which reads 'Mark A. Blankenship'.

Mark A. Blankenship  
President, ILWU Local 30



District 12

Robert LaVenture  
District Director

Chris Youngmark  
Assistant to the Director

Nick Latham  
Sub-District Director

Sandi Martinez Vista Metal Corp.  
13425 Whittram Ave.  
Fontana, Ca 92335

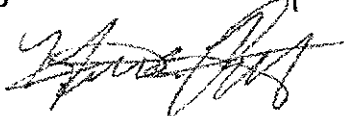
Re: Chaffey Collage Workforce training  
- institute

Dear Sandi,

The Union hereby endorses the Company's effort to secure additional technical and Interpersonal skills training for our local 5632 members, employed at Vista Metal Corp. through the above Reference resource.

Sincerely,

Signature of Union representative



Hector Robles, Unit President



**Training Proposal for:  
San Bernardino Community College District**

**Agreement Number: ET19-0225**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** San Diego

**Analyst:** M. Ibarra

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate SB <100 SET HUA	Industry Sector(s):	Manufacturing Transportation/Logistics Warehousing Aerospace and Defense  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**

<b>Program Costs</b>	+	<b>Support Costs</b>	=	<b>Total ETP Funding</b>
\$1,683,504		\$116,364 8%		\$1,799,868

In-Kind Contribution:	50% of Total ETP Funding Required	\$1,592,428
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Commercial Skills, Computer Skills, Cont. Improv., Literacy Skills, Mgmt. Skills, Mfg. Skills, OSHA 10/30	2,898	8 - 200	0	\$556	*\$16.70
				Weighted Avg: 20			
2	Retrainee	Business Skills, Commercial Skills, Computer Skills, Cont. Improv., Literacy Skills, Mgmt. Skills, Mfg. Skills, OSHA 10/30	65	8 - 200	0	\$590	*\$16.70
				Weighted Avg: 24			
3	Retrainee SB <100	Business Skills, Commercial Skills, Computer Skills, Cont. Improv., Literacy Skills, Mgmt. Skills, Mfg. Skills, OSHA 10/30	200	8 - 200	0	\$583	*\$16.70
				Weighted Avg: 21			
4	Retrainee SET HUA	Business Skills, Commercial Skills, Computer Skills, Cont. Improv., Literacy Skills, Mgmt. Skills, Mfg. Skills, OSHA 10/30	57	8 - 200	0	\$590	*\$12.53
				Weighted Avg: 24			

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

**Minimum Wage by County:**

**Job Numbers 1 – 3:** \$18.22 per hour for Alameda, Contra Costa, Marin, San Mateo, Santa Clara, and San Francisco Counties; \$17.54 per hour for Los Angeles County; \$17.50 per hour for Orange County; \$17.03 per hour for San Diego County; \$16.80 per hour for Sacramento County; and \$16.70 per hour for all other counties.

**Job Number 4 (SET/HUA):** \$13.67 per hour for Alameda, Contra Costa, Marin, San Mateo, and Santa Clara Counties; \$15.00 per hour San Francisco County; \$13.25 per hour for Los Angeles County; \$13.12 per hour for Orange County; \$12.77 per hour for San Diego County; \$12.60 per hour for Sacramento County; and \$12.53 per hour for all other counties.

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

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

Participating employers may use up to \$2.50 per hour of health benefits to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Numbers 1 - 3:</b>		
Manufacturing Staff		872
Maintenance Staff		466
Warehouse/Distribution Staff		975
Administration Staff		355
Manager/Supervisor		495
<b>Job Number 4 (SET/HUA):</b>		
Manufacturing Staff		12
Maintenance Staff		9
Warehouse/Distribution Staff		28
Administration Staff		8

## **INTRODUCTION**

Founded in 1926, San Bernardino Community College District (SBCCD) ([www.sbccd.org](http://www.sbccd.org)) is one of 72 College Districts in the state of California. The District consists of two colleges: Crafton Hills College in Yucaipa; and San Bernardino Valley College in San Bernardino. Located in the city of San Bernardino, SBCCD provides academic instruction leading to a certificate, terminal degree, or transfer to a four-year college. In addition to the physical campuses, the District also operates and manages the Economic Development & Corporate Training (EDCT). Also located in the city of San Bernardino, EDCT provides customized not-for-credit training to incumbent workers employed by local businesses and community-based organizations.

The proposed training will target workers from large and small priority and non-priority business with out-of-state competition. Training will also be provided to employers lacking out-of-state competition under the Panel's SET program. In the past, most employers are located in San Bernardino and Riverside Counties, however, training in this proposal extends to companies located statewide.

## **PROJECT DETAILS**

### **Employer Demand**

SBCCD is a member of the Inland Empire Manufacturers' Consortium (IEMC) whose membership includes over 60 local manufacturing and logistics companies. The feedback from these priority-industry employers indicates a strong need for developing and improving mechanical craft, electrical, and welding skills. With the shifting economy, employers are also looking for alternatives in order to move to a high performance workplace, develop leadership skills in frontline workers, train employees in technology, and become more energy efficient.

District representatives report that many of the participating employers in the proposed training plan are members of IMEC and some have received ETP training in the past. However, no trainees will receive duplicate training in this proposal. SBCCD assessed and quantified participating employee training needs which indicate the need for a high performing workplace and improving productivity goals. Training topics have been updated to include current trends and industry changes that will assist participating employers in acquiring technical skills, certificates, and processes to meet industry and business needs as well as assist the company to complete in a global market.

SBCCD requests ETP funding for 3,220 trainees but has current demand for 3,435 trainees (more than 100%).

The core group of participating employers consists of 34 employers: 14 small businesses (41%) and 20 large employers (59%) across Northern and Southern California. The majority of employers (79%) are in priority industries.

### **Training Plan**

Training will be provided to approximately 3,220 frontline, supervisory, and management staff employed in manufacturing, distribution, and transportation industries. Training will be provided at the District's training center in San Bernardino (50%) and at employer's worksite (50%) in the following types of training respective to the employers' workforce needs:

**Business Skills** – Training topics include Costs and Analysis, Customer Service, Conflict Management, Crisis Management, Interpersonal Skills, Emotional Intelligence, Project Management, Time Management, Negotiation Skills, Leadership Skills, Supervisory Skills, Presentation Skills, Sales & Marketing Skills, Change Management, Goal Setting, Communication Skills, Accountability, Business Strategies, Financial Strategies, Standard Office Procedures, Scheduling and Planning, and Strategic Planning.

**Commercial Skills** – Training topics include Construction Management Skills, Drone Technology Skills, Photovoltaic and Solar Panel Applications, HVAC, and Traffic Control.

**Computer Skills** – Training topics include Software Applications, Adobe Applications, Intermediate & Advanced Microsoft Office, Computer-Aided Drafting, Database Management, Solid Works Modeling, Shipping Solutions and Related Logistic Software Applications, Computer Networking, Inventory Control, Purchase Order Tracking, Cost Tracking and Analysis, Document Control, World-Wide Web, and Managing Email.

**Continuous Improvement** – Training topics include Decision Making, AGILE, SCRUM, Supply Chain Elements & Management, Problem Solving, Lean/5S, Inventory Control, Basic Logistics Standard Practices, Teambuilding, Root Cause Analysis, Six Sigma, Strategic Process Control



(SPC), ISO & AS Standards, Just-in-Time Manufacturing, Workflow & Scheduling, Process Improvement, Coaching & Mentoring, Managing a High Performance Workplace, Manufacturing Resource Planning, and Material Resource Planning.

**Literacy Skills** – Training topics include Basic Writing & Reading, Vocational English as a Second Language (VESL), and Language Comprehension.

**Management Skills** (for management trainees only) – Training topics include Certified Logistics Manager, Strategic Planning for Managers, Root Cause Analysis for Managers, Communicating and Teambuilding for Managers, and Manager Bootcamp.

**Manufacturing Skills** – Training topics include Manufacturing Practices and Procedures, Production Operations, Production & Machinery, Parts & Products Manufacturing, Equipment Operation, Warehousing, Intermediate & Advanced Mechanical Crafts, Electrical Skills, Welding Skills, Forklift Training, Shop Math, Blue Print & Schematic Drawings, Equipment Maintenance & Repair, and Production Operations.

### **Certified Safety Training**

#### ➤ **OSHA 10/30**

This training is a series of courses “bundled” by industry sector and occupation. It consists of 10 hours of classroom training for journey-level workers and 30 hours for frontline supervisors. It may also be delivered to frontline workers if specifically required by the job order. The coursework is geared to construction work. 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. The trainer-to-trainee ratio for OSHA 10/30 can be 1:40.

### **Curriculum Development**

SBCCD’s curriculum was developed in consultation with curriculum advisory members of IEMC. The District also conducts direct meetings with local employers to identify their unique training needs. These curriculum development relationships have enabled SBCCD to develop an overall training model that is customizable by the employer. Students and employers are surveyed following training to confirm that course content and instructors have proven beneficial and relevant to employer and employee needs. Based on this feedback, the training curriculum can be adjusted as necessary.

### **Trainer Qualifications**

Trainers employed by SBCCD are California resident and qualified instructors with the education and experience to train in the topics delivered. Training vendors are qualified instructors and subject-matter experts. Vendors possess knowledge and skill sets that SBCCD trainers are unable to match, specifically, in Lean applications and healthcare.

### **Impact/Outcome**

Trainees in the welding program may receive an American Welding Society (AWS) certification, while those taking mechanical craft courses may be eligible for National Center for Construction Education and Research (NCCER) certification. Other certifications may include continuous improvement in International Organization for Standardization (ISO), Occupational Safety and Hazard (OSHA), and Professional in Human Resources (PHR).

## **Marketing and Support Costs**

SBCCD's EDCT division provides economic and workforce training to local area employers and has been a member of the IEMC for over 12 years. EDCT is also part of a rapid response team coordinated by the San Bernardino Workforce Investment Board (WIB) that was created to respond to the immediate training needs of the local employers experiencing a critical need for skill upgrade training. Many of the companies that have expressed interest in participating in the proposed training plan are IEMC members that have received ETP training in the past. The District has also identified new companies with expressed need for training. SBCCD will continue to market and recruit additional trainees as needed utilizing all recruitment channels including presentations at trade associations and mailings from the College's distribution list.

SBCCD is requesting 8% support costs for this proposal to cover the cost of recruiting additional employers and assessing employer-specific job training requirements. Assessment activities and employer recruitment will continue to take place throughout the duration of the contract. Staff recommends approval of 8% for support costs.

## **Special Employment Training (SET)**

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

### **➤ Wage Modification**

#### **High Unemployment Area (HUA)**

Trainees in Job Number 4 work in a High Unemployment Area (HUA). This is a region with unemployment exceeding the state average by 25%.

The Panel may modify the wage for these trainees by up to 25% if post-retention wages exceed the start-of-training wages. SBCCD requests this wage modification for trainees in Job Number 4.

## **Commitment to Training**

ETP funds will not displace the existing financial commitment to training of participating employers. Training provided through the proposed Agreement will not circumvent any existing funds used for training by the participating employers. Employers will continue to fund state-mandated and on-the-job training, and will continue to provide their own training not eligible for ETP funding reimbursement through the proposed contract. Safety training is, and will continue to be, provided by the participating employers in accordance with all pertinent requirements under state and federal law.

### **➤ Training Infrastructure**

SBCCD's EDCT has been delivering and coordinating training projects for over 13 years, including ETP Agreements. As a repeat ETP contractor, EDCT staff are familiar with ETP administration requirements and regulations and are experienced with project implementation and administration. EDCT has designated six employees responsible for project administration. The Director of Workforce Development will oversee project activities and manage administration.

SBCCD will retain administrative control of all activities associated with all training provided by other colleges, including data entry, recordkeeping and project administration and ensure all participating employers and employees are eligible for training. Staff has been designated to coordinate ETP-funded training at each location.

Training will commence upon contract approval.

### **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.

### **ACTIVE PROJECTS**

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0421	\$949,897	3/1/17 – 2/28/19	1,888	1,280	59*

\*As of 8/8/18, the ETP Online Systems reflect 40,949 reimbursable hours have been tracked for 1,280 trainees, equating to potential earnings of \$757,914 (80% of Agreement amount). SBCCD anticipates earning 100% of the Agreement amount (\$949,897) based on training currently committed to by employers and in progress through the end of the training period (11/28/18).

### **PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0111	Various cities in San Bernardino and Riverside Counties	8/1/15 – 7/31/17	\$949,960	\$918,717 (97%)
ET15-0214	Various cities in San Bernardino and Riverside Counties	8/4/14 – 9/3/15	\$374,614	\$347,387 (93%)
ET13-0180	Various cities in San Bernardino and Riverside Counties	10/22/12 – 10/21/14	\$699,896	\$699,869 (100%)

### **DEVELOPMENT SERVICES**

N/A

### **ADMINISTRATIVE SERVICES**

N/A

### **TRAINING VENDORS**

SBCCD retained the following training vendors in connection with this proposal:

- Developing Leaders, Inc. of Fontana to provide various Business and Continuous Improvement Skills such as Leadership and Lean training for a fee of \$90 per hour;
- Envision Education, LLC of Rancho Cucamonga to provide various Business and Continuous Improvement Skills such as Lean (Healthcare), Change Management, and Emotional Intelligence training for a fee of \$75 per hour; and
- Universal Professional Personnel Services of San Bernardino to provide various Continuous Improvement Skills such as Accountability for a fee of \$75 per hour.

Other trainers will be identified as they are retained.

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

8 – 200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Costs and Analysis
- Customer Service
- Conflict Management
- Crisis Management
- Interpersonal Skills
- Emotional Intelligence
- Project Management
- Time Management
- Negotiation Skills
- Budgeting, Cost Control, and Accounting
- Leadership Skills
- Supervisory Skills
- Performance Management
- Presentation Skills
- Interviewing Skills
- Sales & Marketing Skills
- Professional in Human Resources Preparation Course
- Change Management
- Goal Setting
- Communication Skills
- Understanding Work Group Dynamics
- Accountability
- Business Strategies
- Business Reports
- Financial Strategies
- Standard Office Procedures
- Scheduling and Planning
- Strategic Planning

**COMMERCIAL SKILLS**

- Construction Management Skills
- Drone Technology Skills
- Photovoltaic and Solar Panel Applications
- HVAC (Heating, Ventilation, & Air Condition)
- Traffic Control

**COMPUTER SKILLS**

- Software Applications
- Adobe Applications
- Intermediate & Advanced Microsoft Office
- Computer-Aided Drafting & CAM
- Database Management
- Solid Works Modeling
- Shipping Solutions and Related Logistic Software Applications

- Computer Networking
- Inventory Control
- Purchase Order Tracking
- Cost Tracking and Analysis
- Document Control
- World-Wide Web
- Managing Email

### **CONTINUOUS IMPROVEMENT**

- TQM – Total Quality Management
- Decision Making
- AGILE
- Tracking and Monitoring Production
- SCRUM
- Supply Chain Elements & Management
- Problem Solving
- Lean/5S
- Inventory Control
- Innovation
- Risk Management
- Basic Logistics Standard Practices
- Teambuilding
- Root Cause Analysis
- Six Sigma
- Strategic Process Control (SPC)
- ISO & AS Standards
- Just-in-Time Manufacturing (JIT)
- Workflow & Scheduling
- Internal and External GFSI Audits
- Process Improvement
- Coaching and Mentoring
- Human Centered Design (HCD)
- Managing a High Performance Workplace
- Manufacturing Resource Planning
- Material Resource Planning

### **LITERACY SKILLS\***

- Basic Writing & Reading
- Language Comprehension
- Vocational English as a Second Language (VESL)

\*Literacy Skills training cannot exceed 45% of total training hours, per trainee.

### **MANAGEMENT SKILLS (management trainees only)**

- Certified Logistics Manager (CLM)
- Strategic Planning for Managers
- Root Cause Analysis for Managers
- Communicating and Teambuilding for Managers
- Manager Boot camp

**MANUFACTURING SKILLS**

- Manufacturing Practices and Procedures
- Production Operations
- Production & Machinery
- FSMA Preventive Controls for Human and Animal Foods
- FSPCA for Human Food Compliance
- HACCP for Manufacturing
- SQF Quality Systems for Food Manufacturers
- SQF Advanced Practitioner
- Parts and Products Manufacturing
- Equipment Operation
- Warehousing
- Advanced Mechanical Crafts
- Intermediate Mechanical Crafts
- Manufacturing Skills
- Electrical Skills
- Implementing SQF
- Welding Skills
- PLC (Programmable Logic Controllers)
- CNC (Computer Numerical Controlled Machinery)
- Forklift Training
- Lubrication/Reliability
- Blue Print & Schematic Drawings
- Shop Math
- Equipment Maintenance and Repair
- Production Operations
- Production Maintenance Mechanic
- Nanotechnology Technician's Training
- IIPP Development and Manual Preparation

**OSHA 10/30 (Certified OSHA Instructor) \*\***

- OSHA 10
- OSHA 30

\*\*Safety Training cannot exceed 10% of total training hours, per trainee. This cap does not apply to OSHA 10/30.

Reimbursement for retraining is capped at 200 total training hours, per trainee, regardless of the method of delivery.
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## Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: San Bernardino Community College District

CCG No.: ET19-0225

Reference No: 18-0741

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: 3M Corporation

Address: 8981 US HWY 395

City, State, Zip: Oak Hills, CA 92344

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 90,000

Total # of full-time company employees in California: 10,000

Company: Analytik Jena US LLC

Address: 2066 W 11<sup>th</sup> St.

City, State, Zip: Upland, CA 91786

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 159

Total # of full-time company employees worldwide: 118

Total # of full-time company employees in California: 95

Company: Ardent Mills LLC

Address: 19684 Cajon Blvd.

City, State, Zip: San Bernardino, CA 91739

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 63

Total # of full-time company employees worldwide: 2,000

Total # of full-time company employees in California: 105

Company: Ascena Retail Group, Inc.

Address: 7295 San Gorgonio Dr.

City, State, Zip: Riverside, CA 92508

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 340

Total # of full-time company employees worldwide: 66,000

Total # of full-time company employees in California: 411



## Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: San Bernardino Community College District

CCG No.: ET19-0225

Reference No: 18-0741

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Azuma Foods International Inc., USA

Address: 20201 Mack Street

City, State, Zip: Hayward, CA 94545

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 98

Total # of full-time company employees in California: 89

Company: Blue Diamond Growers

Address: 4800 Sisk Road

City, State, Zip: Modesto, CA 95356

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 300

Total # of full-time company employees worldwide: 2,600

Total # of full-time company employees in California: 2,600

Company: California Steel Industries

Address: 1 California Steel Way

City, State, Zip: Fontana, CA 92335

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 95

Total # of full-time company employees worldwide: 900

Total # of full-time company employees in California: 900

Company: California TrusFrame LLC

Address: 23665 Cajalco Rd.

City, State, Zip: Perris, CA 92570

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 68

Total # of full-time company employees worldwide: 650

Total # of full-time company employees in California: 650

## Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: San Bernardino Community College District

CCG No.: ET19-0225

Reference No: 18-0741

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Church & Dwight Co., Inc.

Address: 17486 Nisqualli Rd.

City, State, Zip: Victorville, CA 92395

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 4,700

Total # of full-time company employees in California: 86

Company: Clover Needlecraft, Inc.

Address: 1441 S. Carlos Ave.

City, State, Zip: Ontario, CA 91761

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 34

Total # of full-time company employees worldwide: 22

Total # of full-time company employees in California: 21

Company: Epic Engineers

Address: 101 E Redlands Blvd.

City, State, Zip: Redlands, CA 92373

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 15

Total # of full-time company employees in California: 15

Company: Gerard Daniel Worldwide

Address: 13055 Jurupa Ave.

City, State, Zip: Fontana, CA 92337

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 33

Total # of full-time company employees worldwide: 350

Total # of full-time company employees in California: 80

## Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: San Bernardino Community College District

CCG No.: ET19-0225

Reference No: 18-0741

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Hangar 24 Craft Brewery

Address: 1710 Sessums Drive

City, State, Zip: Redlands, CA 92373

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 40

Total # of full-time company employees worldwide: 142

Total # of full-time company employees in California: 111

Company: Honeyville, Inc.

Address: 11600 Dayton Drive

City, State, Zip: Rancho Cucamonga, CA 91730

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 115

Total # of full-time company employees worldwide: 400

Total # of full-time company employees in California: 203

Company: Index Fresh

Address: 3880 Lemon Street, Suite 100

City, State, Zip: Riverside, CA 92501

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 84

Total # of full-time company employees worldwide: 110

Total # of full-time company employees in California: 100

Company: Ingram Micro

Address: 12510 Micro Drive

City, State, Zip: Eastvale, CA 91752

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 176

Total # of full-time company employees worldwide: 22,520

Total # of full-time company employees in California: 1,109

## Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: San Bernardino Community College District

CCG No.: ET19-0225

Reference No: 18-0741

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Innocor Inc.

Address: 310 S. Tippecanoe Ave.

City, State, Zip: San Bernardino, CA 92408

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 44

Total # of full-time company employees worldwide: 1,700

Total # of full-time company employees in California: 18

Company: International E-Z Up Inc.

Address: 1900 2<sup>nd</sup> Street

City, State, Zip: Norco, CA 92860

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 248

Total # of full-time company employees worldwide: 139

Total # of full-time company employees in California: 139

Company: Leggett & Platt

Address: 1050 S. Dupont Ave

City, State, Zip: Ontario, CA 91760

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 108

Total # of full-time company employees worldwide: 18,000

Total # of full-time company employees in California: 370

Company: Louis Vuitton US Manufacturing, Inc.

Address: 321 W. Covina Blvd.

City, State, Zip: San Dimas, CA 91773

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 40

Total # of full-time company employees worldwide: 700

Total # of full-time company employees in California: 700

## Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: San Bernardino Community College District

CCG No.: ET19-0225

Reference No: 18-0741

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Mapei Corporation

Address: 5415 Industrial Pkwy.

City, State, Zip: San Bernardino, CA 92407

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 138

Total # of full-time company employees worldwide: 4,000

Total # of full-time company employees in California: 67

Company: McLane Company Inc.

Address: 4472 George Blvd.

City, State, Zip: San Bernardino, CA 92407

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 196

Total # of full-time company employees worldwide: 22,000

Total # of full-time company employees in California: 2,000

Company: Oven Fresh Bakery, Inc.

Address: 23188 Foley Street

City, State, Zip: Hayward, CA 94545

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 12

Total # of full-time company employees worldwide: 20

Total # of full-time company employees in California: 20

Company: P&R Paper Supply Co.

Address: 1898 E. Colton Ave.

City, State, Zip: Redlands, CA 92374

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 51

Total # of full-time company employees worldwide: 268

Total # of full-time company employees in California: 250

## Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: San Bernardino Community College District

CCG No.: ET19-0225

Reference No: 18-0741

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PRINT OR TYPE IN ALPHABETICAL ORDER

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Company: Pep Boys

---

Address: 300 S. Tippecanoe

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City, State, Zip: San Bernardino, CA 92408

---

Collective Bargaining Agreement(s): N/A

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Estimated # of employees to be retrained under this Agreement: 196

---

Total # of full-time company employees worldwide: 3,200

---

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

---

Company: Qycell Corporation

---

Address: 600 S. Etiwanda Ave.

---

City, State, Zip: Ontario, CA 91761

---

Collective Bargaining Agreement(s): N/A

---

Estimated # of employees to be retrained under this Agreement: 54

---

Total # of full-time company employees worldwide: 22

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

---

Company: Radial

---

Address: 2225 Alder Ave.

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City, State, Zip: Rialto, CA 92377

---

Collective Bargaining Agreement(s): N/A

---

Estimated # of employees to be retrained under this Agreement: 154

---

Total # of full-time company employees worldwide: 2,000

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Total # of full-time company employees in California: 235

---

Company: Renovis Surgical Technologies, Inc.

---

Address: 1901 West Lugonia Ave. Ste. 340

---

City, State, Zip: Redlands, CA 92374

---

Collective Bargaining Agreement(s): N/A

---

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

---

Total # of full-time company employees worldwide: 28

---

Total # of full-time company employees in California: 13

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## Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: San Bernardino Community College District

CCG No.: ET19-0225

Reference No: 18-0741

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Revive Brands dba Revive Kombucha

Address: 3900 Cypress Dr.

City, State, Zip: Petaluma, CA 94954

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 9

Total # of full-time company employees worldwide: 27

Total # of full-time company employees in California: 27

Company: States Logistics Services, Inc.

Address: 5650 Dolly Ave.

City, State, Zip: Buena Park, CA 90621

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 141

Total # of full-time company employees worldwide: 548

Total # of full-time company employees in California: 493

Company: Swift Engineering Inc.

Address: 1141-A Via Callejon

City, State, Zip: San Clemente, CA 92677

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 83

Total # of full-time company employees in California: 83

Company: TST, Inc.

Address: 11601 Etiwanda Ave.

City, State, Zip: Fontana, CA 92337

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 208

Total # of full-time company employees worldwide: 265

Total # of full-time company employees in California: 265

**Participating Employers in Retrainee  
Multiple Employer Contracts**

Contractor's Name: San Bernardino Community College District

CCG No.: ET19-0225

Reference No: 18-0741

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Wattrans, Inc.

Address: 14022 Valley Blvd.

City, State, Zip: Fontana, CA 92335

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 15

Total # of full-time company employees worldwide: 40

Total # of full-time company employees in California: 40

Company: Winpak Lane Inc.

Address: 998 S. Sierra Way

City, State, Zip: San Bernardino, CA 92408

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 93

Total # of full-time company employees worldwide: 95

Total # of full-time company employees in California: 95





**Training Proposal for:**

**California Field Ironworkers Apprenticeship Training and  
Journeyman Retraining Fund - Northern California**

**Agreement Number: ET19-0926**

Panel Meeting of: September 28, 2018

ETP Regional Office: Sacramento

Analyst: K. Jones

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate Apprenticeship Veterans	Industry Sector(s):	Construction  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Northern and Central California	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No International Brotherhood of Ironworkers Local 118, 378, 155 and 377		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	N/A		

**FUNDING DETAIL**

<b>Program Costs</b>	+	<b>Support Costs</b>	=	<b>Total ETP Funding</b>
\$888,060		\$61,726 8%		\$949,786

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

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Journeyman Priority Rate	Commercial Skills, OSHA 10/30	40	8-200	0	\$667	\$22.77
				Weighted Avg: 24			
2	Retrainee Apprentice	Commercial Skills, OSHA 10/30	384	8-210	0	\$2,246	\$22.77
				Weighted Avg: 100			
3	Retrainee Pre-Apprentice	Commercial Skills, OSHA 10	8	8-200	0	\$3,369	\$22.77
				Weighted Avg: 150			
4	Retrainee Apprentice Veteran	Commercial Skills, OSHA 10/30	15	8-210	0	\$2,246	\$22.77
				Weighted Avg: 100			

**Minimum Wage by County:** SET/Priority Industry Wage: \$22.77 per hour.  
**Health Benefits:**  Yes  No This is employer share of cost for healthcare premiums – medical, dental, vision.  
**Used to meet the Post-Retention Wage?:**  Yes  No  Maybe  
 Up to \$0.57 per hour may be used to meet the Post-Retention Wage requirement for Job Numbers 2 - 4.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Journymen Ironworker		40
Apprentice Ironworker		384
Pre-Apprentice Ironworker		8
Veteran - Apprentice Ironworker		15

**INTRODUCTION**

The California Field Ironworkers Apprenticeship Training and Journeyman Retraining Fund – Northern California (NorCal Ironworkers) ([www.universityofiron.org](http://www.universityofiron.org)) 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 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. This is NorCal's fifth ETP Agreement, and the fifth in the last five years.

### **Veterans Program**

The curriculum for Veteran trainees will be the same as Apprentice training outlined above, and reimbursed at the same rate as other Apprentices. These trainees are in separate Job Number to better track performance for this cohort, toward the goal of improved outreach for Veterans.

NorCal Ironworkers works in cooperation with Helmets to Hardhats, a national joint labor-management program (<http://www.ironworkers.org/become-an-ironworker/helmets-to-hardhats>) This program helps veterans transition into the civilian workforce. NorCal Ironworkers' website advertises special days just for veterans to apply for the apprenticeship program. Veterans who apply for an apprenticeship can skip the first stage (the written assessment) and go to the second stage (the interview). If eligible, veterans will start as first year apprentices, not as pre-apprentices.

### **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 \$26 to \$21 per class/lab hour. The ETP wage for Apprentices is no less than \$22.77 per hour. However, the actual wages paid are shown in the Training Plan Table for the Panel's information.

### **PROJECT DETAILS**

The NorCal Ironworkers have developed and customized a national ironworker curriculum to address local needs. The training will prepare ironworkers to work on large construction projects including the high speed rail project in Fresno, Sutter Hospitals, Fremont Academic Core buildings, a Senior Care Facility in Pleasanton and Pinole Valley High School. The NorCal Ironworkers are also involved in the construction of multiple high-rise buildings in Oakland and San Francisco, and ongoing solar farm construction in Fresno.

As Journeymen retire and new work develops, a demand for qualified Ironworkers is created. In an effort to meet the demand for experienced ironworkers, NorCal Ironworkers plans to graduate

more than 240 Apprentices in 2018. ETP-funded training will help NorCal Ironworkers to meet its goal by giving trainees the skills needed to advance through the apprenticeship. Under the previous agreement, NorCal Ironworkers were able to graduate more than 230 Apprentices in 2017.

Historically, Ironworkers mainly worked with wrought iron. Due to advancements made in the building trades, Ironworkers utilize many different materials including ferrous and non-ferrous metals, plastics, glass, concrete and composites. Training under this Agreement will ensure trainees have the skills and knowledge to work with a variety of materials required in their industry.

## Training Plan

Training will be delivered via class/lab in the following:

**Commercial Skills:** Journeymen training will bring work skills up-to-date, as required by participating employers. Apprentice training will give workers the knowledge required to reach the Journeymen level. Pre-Apprentice training will prepare trainees for the apprenticeship program. Courses include Advanced Welding, Architecture Designs and Advanced Plan Reading, Post Tensioning, Rebar Detailing, Traffic Flagger and Green Training.

**OSHA 10/30:** Apprentice and Journeymen trainees will receive either OSHA 10 or OSHA 30 training and Pre-Apprentices may receive OSHA 10 training in a series of courses “bundled” by industry sector and occupation. The coursework is geared to construction work, and must be approved by Cal-OSHA. The instructors must be certified by Cal-OSHA as well. Completion of the training results in a certificate that expands employment opportunities. OSHA 10/30 is not included in the 10% limitation on safety training.

## Commitment to Training

ETP funding will not displace NorCal Ironworkers financial commitment to training. Signatory employers will continue to make contributions to the training trust for every hour worked by Apprentices, Pre-Apprentices and Journeymen. General safety training is provided by participating employers in accordance with all pertinent requirements under state and federal law.

### ➤ Training Infrastructure

The Apprenticeship Director and an Administrative Assistant who were involved in previous ETP training Agreements, will assist with administration. Designated staff will coordinate training and review attendance rosters for ETP compliance. NorCal Ironworkers retained Strategy Workplace Communications to provide administrative services. Training will be delivered by in-house experts.

## Marketing and Support Costs

The NorCal Ironworkers requests 8% in support costs due to their efforts in marketing, recruitment. NorCal Ironworkers also conducts ongoing assessments of employer-specific job requirements. Open houses will be held both for workers and for employers. In Benicia, potential ironworkers tour the facility and talk with the staff about careers in ironworking. Employer open houses will provide an opportunity for company owners, project managers, and company safety representatives to observe and evaluate the Ironworkers Qualified Rigger and Signalman Training Program and speak with staff members and trainees.

NorCal Ironworkers and the various local unions will publicize the availability of training through their websites, direct mailings, brochures/flyers, personal contacts, telephone calls, public service

announcements and e-mail announcements. It will also promote this training program at labor-management meetings and industry assemblies, site visits to local schools, trade shows, industry meetings, and vocational outreach organizations. Staff recommends the 8% in support costs.

### **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 NorCal Ironworkers under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET18-0911	\$530,465	10/02/2017 – 10/01/2019	415	0	0

Based on ETP Systems, 30,816 reimbursable hours have been tracked for potential earnings of \$462,240 (88% of approved amount).

### **PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0924	Northern & Central California	06/06/2016 – 06/05/2018	\$518,825	\$518,825 (100%)
ET 15-0916	Northern & Central California	02/02/2015 – 02/01/2017	\$423,515	\$423,515 (100%)
ET13-0909	Northern & Central California	10/01/2012 – 09/30/2014	\$326,942	\$326,942 (100%)

### **DEVELOPMENT SERVICES**

California Labor Federation in Sacramento and Strategy Workplace Communication in Oakland assisted with development at no cost.

**ADMINISTRATIVE SERVICES**

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

**TRAINING VENDORS**

N/A

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

8-200

**Journeyman**

Trainees may receive any of the following:

**COMMERCIAL SKILLS**

- Advanced Welding
- Architecture Designs and Advanced Plan Reading
- Blueprint Reading
- Energy Audits
- Forklift Training
- Heat Stress Safety
- Layout and Instruments
- Lead in Construction
- Mine Safety and Health Administration
- Post Tensioning Certification
- Proper Equipment Set-Up (Green Training)
- Proper Installation & Use of Testing & Auditing Materials & Equipment (Green Training)
- Qualified Rigger
- Rigging Review
- Safe Working Practices
- Scaffold Erector
- Scaffold User
- Subpart R (Steel Erection)
- Understanding New Technologies and Changes to Industry Standards (Green Training)
- Welding and Burning

**OSHA 10/30** (Certified OSHA Instructor)

- OSHA 10
- OSHA 30

**Class/Lab Hours**

8-210

**Apprentice****COMMERCIAL SKILLS**

- Architectural
- Architectural Safe Work Practices
- Blueprint Reading
- Cranes (Includes Scaffold Erector/Dismantler)
- First Aid/CPR
- Foreman Training
- Green Construction for Ironworkers

- Heat Stress Safety
- Lead in Construction
- Measurement and Math
- Mixed Base (Introduction to Blueprint Reading and Math)
- Oxy-Fuel and Welding Safe Work Practices
- Post Tensioning
- Precast/Metal Building (Includes Scaffold User)
- Rebar Detailing
- Reinforcing Safe Work Practices
- Rigging and Forklift Training
- Rigging Safe Work Practices
- Structural
- Structural Safe Work Practices, Subpart R Steel Erection
- Welding

**OSHA 10/30** (Certified OSHA Instructor)

- OSHA 10
- OSHA 30

**Class/Lab Hours**

8-200

**Pre-Apprentice**

**COMMERCIAL SKILLS**

- Green Training
- Firewatch Training
- Heat Stress Safety
- Traffic Flagger
- Welding I and II

**OSHA 10** (Certified OSHA Instructor)

- OSHA 10

Safety Training cannot exceed 10% of total training hours per-trainee. This 10% safety training cap does not apply to OSHA 10/30 training.

Note: Reimbursement for training is capped at 200 total training hours per trainee for Job Numbers 1 and 3. Reimbursement is capped at 210 total hours per trainee for Job Numbers 2 and 4.





**Training Proposal for:**

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

**Agreement Number: ET19-0925**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** Sacramento

**Analyst:** K. Jones

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate Apprenticeship Veterans	Industry Sector(s):	Construction  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Southern California	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No International Brotherhood of Ironworkers Locals 433, 416 and 229		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	N/A		

**FUNDING DETAIL**

<b>Program Costs</b>	+	<b>Support Costs</b>	=	<b>Total ETP Funding</b>
\$887,346		\$61,472 8%		\$948,818

<b>In-Kind Contribution:</b>	<b>50% of Total ETP Funding Required</b>	<b>Inherent</b>
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate Journeyman	Comm'l Skills, OSHA 10/30	110	8-200	0	\$667	\$22.77
				Weighted Avg: 24			
2	Retrainee Apprentice	Comm'l Skills, OSHA 10/30	371	8-210	0	\$2,268	\$22.77
				Weighted Avg: 101			
3	Retrainee Apprentice Veteran	Comm'l Skills, OSHA 10/30	15	8-210	0	\$2,268	\$22.77
				Weighted Avg: 101			

**Minimum Wage by County:** SET/Priority Industry Wage: \$22.77 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 \$1.87 per hour may be used to meet the Post-Retention Wage requirement for Job Numbers 2 and 3.

**Wage Range by Occupation**

Occupation Titles	Wage Range	Estimated # of Trainees
Journeyman Ironworker		110
Apprentice Ironworker		371
Veteran Apprentice Ironworker		15

**INTRODUCTION**

The California Field Ironworkers Apprenticeship Training and Journeyman Retraining Fund (SoCal Ironworkers) ([www.universityofiron.org](http://www.universityofiron.org)) seeks funding to train Journeyman 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). This is SoCal Ironworkers fifth ETP Agreement; and the fourth in the last five years.

### **Veterans Program**

The Veteran training curriculum will be the same as Apprentice training outlined above. These 15 Veteran trainees are in a separate Job Number to better track performance toward the goal of improved outreach for Veterans.

The Panel is committed to supporting job-related training that helps Veterans transition into the California workforce. SoCal Ironworkers recruits Veterans in cooperation with Helmets to Hardhats, a national joint labor-management program that recognizes the link between skills acquired in military service and the building trades. On its website, SoCal Ironworkers advertises special days for Veterans to visit certain locations and apply for the apprenticeship program. Veterans who apply for an apprenticeship can skip the first stage (the written assessment) and go the second stage (the interview).

These efforts on the part of SoCal Ironworkers has led to success in serving Veterans. Thirty-one Veterans were enrolled and trained under its current Agreement.

### **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 \$26 to \$21 per class/lab hour. The ETP wage for Apprentices is no less than \$22.77 per hour. However, the actual wages paid are shown in the Training Plan Table for the Panel's information.

### **PROJECT DETAILS**

Demand for skilled Ironworkers remains strong, especially workers with advanced welding skills. Both Journeymen and Apprentices work on the construction of local hospitals, schools, hotels, recreational areas, parking structures, freeways, rail stations and bridges. Training will expand trainees' skills in preparation for projects in the Los Angeles, Riverside and Orange counties. Current construction projects include the Ivanpah Solar Power Plant in the Mojave Desert, construction of the Wilshire Grand skyscraper in downtown Los Angeles and the San Diego Library.

In Addition to new construction projects, SoCal Ironworkers estimates that 40% of its members will retire in the next decade. This will generate increased demand for apprentices. The training to be provided under this proposal will help meet the need for highly skilled Ironworkers (Apprentices and Journeymen) throughout Southern California.

The SoCal Ironworkers are making strides in attracting women apprentices. To support women in the ironworking trade and increase the number of women apprentices, SoCal Ironworkers participate in the Women Building Nations Conference. This conference is sponsored by the State Building and Construction Trades Council of California. Participation in this conference and continued outreach to women will allow SoCal Ironworkers to increase diversity within the ironworking industry.

## **Training Plan**

Training will be delivered via class/lab in the following:

**Commercial Skills:** Training will be offered to Journeymen and Apprentices to develop the skills levels required in the construction industry. Courses include Post Tensioning Certification, Proper Equipment Set-Up (Green Training), Welding and Burning, Foreman Training, Precast/Metal Building (Includes Scaffold User) and Rebar Detailing.

**OSHA 10/30:** Journeymen and Apprentices may receive OSHA 10/30. This training is a series of courses “bundled” by industry sector and occupation. Completion of the training results in a certificate that expands employment opportunities. Typically, OSHA training is delivered to workers in the building trades. This training is not required as a condition of doing business in California. Note: To ensure that each trainee receives certification, ETP will only consider payment earned upon completion of the full course. OSHA 10/30 is not included in the 10% limitation on safety training. The trainer-to-trainee ratio is 1:40 for OSHA 10/30.

## **Commitment to Training**

ETP funding will not displace SoCal Ironworkers financial commitment to training. Signatory employers will continue to make contributions to the training trust for every hour worked by Apprentices and Journeymen. General safety training is provided by participating employers in accordance with all pertinent requirements under state and federal law.

### ➤ Training Infrastructure

The Apprenticeship Coordinator and two Training Coordinators, who were involved in previous ETP training Agreements, will oversee administration. The staff will coordinate training and review attendance rosters for ETP compliance. SoCal Ironworkers employ four full-time and fifteen part-time trainers to deliver all training and document the training in accordance with ETP regulations. SoCal Ironworkers have retained Strategy Workplace Communications to provide administrative services.

## **Marketing and Support Costs**

SoCal Ironworkers are requesting 8% in support costs to fund recruitment and conduct ongoing assessments of employer-specific job requirements. Five staff people in the various SoCal Ironworker locations will assist with marketing, recruitment, needs assessments and scheduling.

SoCal Ironworkers and the three union locals will publicize the availability of training through their website, direct mailings, brochures/flyers, personal contacts, telephone calls, public service announcements and e-mail announcements. It will promote this training at labor-management meetings and industry assemblies, site visits to local schools, trade shows, industry meetings, and vocational outreach organizations. Staff recommends the 8% in support costs.

### **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 SoCal Ironworkers under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET18-0910	\$511,010	10/02/2017 – 10/01/2019	433	48	0

Based on ETP Systems, 35,705 reimbursable hours have been tracked for potential earnings of \$511,010 (100% of approved amount).

### **PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0927	La Palma	06/06/16 - 06/05/18	\$511,010	\$511,010 (100%)
ET15-0923	Southern California	03/02/15 - 03/01/17	\$359,500	\$359,500 (100%)
ET13-0918	Southern California	01/01/13 - 12/31/14	\$330,014	\$330,014 (100%)

### **DEVELOPMENT SERVICES**

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

**ADMINISTRATIVE SERVICES**

Strategy Workplace Communications will also perform administrative services for an amount not to exceed 13% of payment earned.

**TRAINING VENDORS**

N/A

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

8-200 (Job Number 1)

Trainees may receive any of the following:

**Journeyman Training****COMMERCIAL SKILLS**

- Advanced Welding
- Architecture Designs and Advanced Plan Reading
- Blueprint Reading
- Energy Audits
- First Aid/CPR
- Forklift Training
- Heat Stress Safety
- Layout and Instruments
- Lead in Construction
- Mine Safety and Health Administration
- Post Tensioning Certification
- Proper Equipment Set-Up (Green Training)
- Proper Installation and Use of Testing and Auditing Materials and Equipment (Green Training)
- Qualified Rigger
- Rigging Review
- Safe Working Practices
- Scaffold Erector
- Scaffold User
- Subpart R (Steel Erection)
- Understanding New Technologies and Changes to Industry Standards (Green Training)
- Welding and Burning

**OSHA 10/30** (Certified OSHA Instructor)

- OSHA 10
- OSHA 30

**Class/Lab Hours**

8-210 (Job Numbers 2 &amp; 3)

**Apprentice Training**

Trainees may receive any of the following:

**COMMERCIAL SKILLS**

- Architectural
- Architectural Safe Work Practices
- Blueprint Reading
- Cranes (Includes Scaffold Erector/Dismantler)
- First Aid/CPR

- Foreman Training
- Green Construction for Ironworkers
- Heat Stress Safety
- Lead in Construction
- Measurement and Math
- Mixed Base (Introduction to Blueprint Reading and Math)
- Oxy-Fuel and Welding Safe Work Practices
- Post Tensioning
- Precast/Metal Building (Includes Scaffold User)
- Rebar Detailing
- Reinforcing Safe Work Practices
- Rigging and Forklift Training
- Rigging Safe Work Practices
- Structural
- Structural Safe Work Practices, Subpart R Steel Erection
- Welding

**OSHA 10/30** (Certified OSHA Instructor)

- OSHA 10
- OSHA 30

Safety Training cannot exceed 10% of total training hours per-trainee. This 10% safety training cap does not apply to OSHA 10/30 training.

Note: Reimbursement for training is capped at 200 total training hours per trainee for Job Number 1. Reimbursement is capped at 210 total hours per trainee for Job Numbers 2 and 3.
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**Training Proposal for:**  
**San Joaquin County Economic Development Association**  
**Agreement Number: ET19-0241**

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** Sacramento

**Analyst:** C. Kaiser

**PROJECT PROFILE**

Contract Attributes:	Priority Rate Retrainee SB <100 HUA SET	Industry Sector(s):	MEC Manufacturing Services Transportation/Logistics Warehousing Agriculture Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Joaquin	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	≤20%		

**FUNDING DETAIL:**

<b>Program Costs</b>	+	<b>Support Costs</b>	=	<b>Total ETP Funding</b>
\$292,160		\$20,160 8%		\$312,320

<b>In-Kind Contribution:</b>	<b>50% of Total ETP Funding Required</b>	<b>\$195,000</b>
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate HUA	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, Management Skills, Manufacturing Skills	200	8-200	0	\$667	*\$12.53
				Weighted Avg: 24			
2	Retrainee Priority Rate SET HUA	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, Management Skills	100	8-200	0	\$667	*\$12.53
				Weighted Avg: 24			
3	Retrainee SET HUA	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, Management Skills	30	8-200	0	\$590	*\$12.53
				Weighted Avg: 24			
4	Retrainee Priority Rate HUA SB <100	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, Management Skills, Manufacturing Skills	100	8-200	0	\$556	*\$12.53
				Weighted Avg: 20			
5	Retrainee Priority Rate SET HUA SB <100	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, Management Skills	50	8-200	0	\$556	*\$12.53
				Weighted Avg: 20			
6	Retrainee SET HUA SB <100	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, Management Skills	20	8-200	0	\$556	*\$12.53
				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 statewide minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table.

**Minimum Wage by County:** Job Numbers 1 - 6: \$12.53 per hour for San Joaquin 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
Advanced Manufacturing Technicians		20

Biofuel Technicians		10
Food Processing Technicians		50
Frontline Supervisors/Managers		30
Logistics/Fulfillment Workers		150
Machine Operators		25
Maintenance Mechanics		15
Packaging and Filling Machine Operators		150
Sterile Technicians		50

## **INTRODUCTION**

Established in 1963 and headquartered in Stockton, San Joaquin County Economic Development Association (SJC) ([www.sjcworknet.org](http://www.sjcworknet.org)) fosters economic development and offers business resources in San Joaquin County. The Company's business resources include skilled workforce training, business financing, business advocacy, and business retention and expansion programs. SJC also recruits for companies with job openings and is proactive in layoff aversion efforts.

SJC maintains close working relationships with local employers, local municipalities, the San Joaquin County Employment and Economic Development Department, and the local Chamber of Commerce.

## **PROJECT DETAILS**

Employers in the core group are primarily in manufacturing and transportation/logistics industries. Additional sectors include construction, energy, sanitation, and agriculture.

Participating employers are looking to improve employee skills to address changes in the workforce and meet future demand. The global economy and tight labor market underscore the need for training to bolster competitiveness and financial viability. Companies are also looking to streamline processes and increase efficiency.

Additionally, manufacturing is constantly changing, along with technology in the manufacturing industry including automated machinery and software. The machinery and the computer systems require extensive training for the employees. Training will allow employers to bridge the skill gap and respond to unique employer challenges and growth opportunities.

### **Training Plan**

Customized training for individual employers will be provided at the employers' facilities. Trainings will be provided to trainees via Class/Lab and E-Learning.

**Business Skills**– Training will be provided to all occupations. Topics include Customer Service, Communication Skills, and Project Management. Training is intended to provide the skills to effectively and efficiently maintain business operations.

**Commercial Skills**– Training will be provided to all occupations. Topics include Inventory Management, Logistics and Shipping, and Product Handling. These courses are intended to improve efficiency.

**Computer Skills**– Training will be provided to all occupations. Topics include CAD/CAM, Crystal Reports, and Project Planning Software. These courses are intended to improve software competencies.

**Continuous Improvement**– Training will be provided to all occupations. Topics include Process Analysis and Project Tracking. These courses are intended to improve processes.

**Management Skills**– Training will be provided to Frontline Supervisors/Managers. Topics include Decision Making and Leading Change.

**Manufacturing Skills**– Training will be provided to Advanced Manufacturing Technicians, Food Processing Technicians, Machine Operators, Packaging and Filling Machine Operators, and Frontline Supervisors/Managers. Topics include Production Control, Maintenance of Equipment, and Good Manufacturing Practices. Training is intended to increase production.

### **Frontline Worker**

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

### **SET/HUA**

Under Special Employment Training (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 Numbers 2, 3, 5 & 6 will qualify under SET guidelines.

All Job Numbers are located in San Joaquin County, a High Unemployment Area with unemployment exceeding the state average by at least 25%. SJC is requesting a wage modification for all Job Numbers.

### **Commitment to Training**

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

#### ➤ Training Infrastructure

Training will be delivered primarily at participating employers' worksites, with occasional center-based classes for employers with similar training needs. SJC's Analyst III and two additional staff members will oversee the administration of the ETP Contract.

### **Employer Demand**

Employer demand is determined by direct input from local companies in San Joaquin County as well as employer groups such as Business Team San Joaquin and county economic development agencies.

### **Marketing and Support Costs**

Marketing consists of mail, email, and direct face-to-face outreach. Support costs of 8% will be used to recruit additional participating employers and assess employer specific job training requirements throughout the term of the project. Staff recommends the 8% support costs.

### **Trainer Qualifications**

Training will primarily be delivered by vendors. However, some training may also be provided by participating employers' experienced trainers.

### **Tuition Reimbursement**

SJC 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**

To Be Determined

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

8-200 Trainees may receive any of the following:

**BUSINESS SKILLS**

- Change Management
- Communications Skills
- Customer Retention and Identifying Customer Needs
- Customer Service
- Data Accuracy
- E-Commerce
- POS Transactions
- Project Management
- Scheduling and Budgeting
- Time Management

**COMMERCIAL SKILLS**

- Distribution Systems
- Inspection and Quality Control
- Inventory Management
- Lean Enterprises
- Logistics and Shipping
- Product Handling
- Sanitation
- Six Sigma (Green Belt)
- Tracking Product
- Transaction Control
- Transport Loading/Unloading
- Warehousing Control and Tracking

**COMPUTER SKILLS**

- Adobe
- CAD/CAM (Computer-Aided Manufacturing) Software
- CMM (Computer/Coordinate Measuring Machine)
- CNC (Computerized Numerical Control) Applications
- CNC (Computerized Numerical Control) Programming
- Crystal Reports
- Enterprise Resource Planning (ERP)
- Logistics Software
- Microsoft (MS) Office Suite (Intermediate and Advanced)
- Microsoft Visual (Intermediate and Advanced)
- Project Planning Software
- Project Tracking
- QuickBooks
- Warehouse & Inventory Systems

**CONTINUOUS IMPROVEMENT**

- Compliance
- Cross-Training

- Cycle Time Reduction
- Food Safety
- ISO 9000 and ISO 14400
- Leadership Skills for Frontline Workers
- Problem Solving
- Process Analysis
- Production Operations and Workflow
- Project Tracking
- SMED (Single Minute Exchange of Die)
- Standard Work Procedures
- Statistical Process Control
- Teamwork

**MANAGEMENT SKILLS** (Managers/Supervisors only)

- Decision Making
- Developing High Performance Teams
- Leading Change
- Planning, Assigning, and Follow-up
- Principals of Modern Leadership

**MANUFACTURING SKILLS**

- Assembly Methods and Techniques
- Controls and Systems
- Equipment Procedures
- Good Manufacturing Practices
- Maintenance of Equipment
- Manufacturing Operations
- Operating Equipment
- Production Control

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

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

## Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: San Joaquin County Economic Development Association    CCG No.: ET19-0241  
Reference No. 18-0009    Page 1 of 3

PRINT OR TYPE IN ALPHABETICAL ORDER

---

Company: American Custom Meats

---

Address: 4276 Tracy Blvd.

---

City, State, Zip: Tracy, CA 95304

---

Collective Bargaining Agreement(s): No

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

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Total # of full-time company employees worldwide: 88

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Total # of full-time company employees in California: 88

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---

Company: Central Plastics

---

Address: 1905 N. MacArthur Dr., Ste.100

---

City, State, Zip: Tracy, CA 95376

---

Collective Bargaining Agreement(s): No

---

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

---

Total # of full-time company employees worldwide: 27

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Total # of full-time company employees in California: 27

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Company: Crothal Healthcare

---

Address: 2365 N. Airport Way

---

City, State, Zip: Manteca, CA 95336

---

Collective Bargaining Agreement(s): No

---

Estimated # of employees to be retrained under this Agreement: 80

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Total # of full-time company employees worldwide: 80

---

Total # of full-time company employees in California: 80

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---

Company: Dr3 Recycling

---

Address: 4447 S. Airport Way

---

City, State, Zip: Stockton, CA 95206

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Collective Bargaining Agreement(s): No

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

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Total # of full-time company employees worldwide: 10

---

Total # of full-time company employees in California: 10

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## Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: San Joaquin County Economic Development Association    CCG No.: ET19-0241  
Reference No. 18-0009    Page 2 of 3

---

Company: Medline Industries

---

Address: 5701 Promontory Parkway

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City, State, Zip: Tracy, CA 95377

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Collective Bargaining Agreement(s): No

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

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Total # of full-time company employees worldwide: 100

---

Total # of full-time company employees in California: 100

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Company: Metal Finishing Solutions

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Address: 1325 El Pinal Dr.

---

City, State, Zip: Stockton, CA 95206

---

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: Pacific Ethanol

---

Address: 3028 Navy Dr.

---

City, State, Zip: Stockton, CA 95206

---

Collective Bargaining Agreement(s): No

---

Estimated # of employees to be retrained under this Agreement: 15

---

Total # of full-time company employees worldwide: 15

---

Total # of full-time company employees in California: 15

---

Company: Sunny Valley Meats

---

Address: 2475 W. Yosemite Ave.

---

City, State, Zip: Manteca, CA 95337

---

Collective Bargaining Agreement(s): No

---

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

---

Total # of full-time company employees worldwide: 110

---

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

---

## Participating Employers in Retrainee Multiple Employer Contracts

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Contractor's Name: San Joaquin County Economic Development Association    CCG No.: ET19-0241  
Reference No. 18-0009    Page 3 of 3

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---

Company: Surtec

---

Address: 1880 N. MacArthur Dr.

---

City, State, Zip: Tracy, CA 95376

---

Collective Bargaining Agreement(s): No

---

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

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Total # of full-time company employees worldwide: 50

---

Total # of full-time company employees in California: 50

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Company: Swiss American Sausage

---

Address: 251 D'Arcy Parkway

---

City, State, Zip: Lathrop, CA 95330

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Collective Bargaining Agreement(s):No

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

---

Total # of full-time company employees worldwide: 45

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

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Company: Van De Pol Petroleum

---

Address: 4895 S. Airport Way

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City, State, Zip: Stockton, CA 95206

---

Collective Bargaining Agreement(s): No

---

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

---

Total # of full-time company employees worldwide: 75

---

Total # of full-time company employees in California: 75

---



**Amendment Proposal #1 for:  
Studio Arts, Ltd.  
Agreement Number: ET18-0158**

**Amendment Effective Date:** January 26, 2018

**Panel Meeting of:** September 28, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** E. Wadzinski

**CURRENT PROJECT PROFILE**

Contract Type:	Priority Retrainee SB<100	Industry Sector(s):	Multimedia/Entertainment
Counties Served:	Los Angeles, Orange	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Priority Industry:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

Current Contract Term: January 25, 2018 to January 24, 2020

<b>Current Funding</b>	<b>In-Kind Contribution</b>
\$600,600	\$691,200

**AMENDMENT FUNDING**

Requested Funding	Support Costs	Amendment Funding	In-Kind Contribution
+\$326,456	+\$22,421	+\$348,877	+\$401,300

<b>Total Funding</b>
\$949,477

**AMENDMENT TRAINING PLAN TABLE**

Job No.	Job Description (By Contract Type)	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Priority Rate Retrainee	Advanced Technology	300	8-240	0	<b>\$1,946</b>	\$17.50
				Weighted Avg: <b>70</b>			
2	Priority/SB<100	Advanced Technology	<b>300</b>	8-240	0	<b>\$1,223</b>	\$17.50
				Weighted Avg: <b>44</b>			

**Minimum Wage by County:** \$17.54 per hour for Los Angeles County; and \$17.50 for Orange County.

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

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

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

Wage Range by Occupation	
Occupation Title	Wage Range
Animator	
Art Director	
Artist	
Composer	
Construction Coordinator	
Costume Designer	
Editor	
Hair Stylist	
Illustrator/Storyboard	
Lighting Tech	
Makeup Artist	
Matte Artist	
Model Maker	
Modeler	
Ornamental Plasterer	
Production Designer	
Prop Designer/Animation	
Prop Maker	
Set Decorator	
Set Designer	
Technical Director	
Textures Artist	
Visual Development	

## **INTRODUCTION**

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

## **AMENDMENT DETAILS**

### **Employer Demand**

Studio Arts initial training plan was conservative, focusing on 600 priority industry employees receiving a low weighted average of 36 hours of training. However, to date, 527 retrainees have started training and training hours documented are sufficient to support 81% of the Agreement amount as they completed more than originally anticipated. Many of these trainees have not completed the training they need; and training for additional priority industry participating employer employees has yet to start.

Studio Arts is requesting additional funds to complete ongoing training for trainees who have started training, and to accommodate the initial participating employer demand for employees scheduled to start training in the following months. The additional training hours will allow trainees to continue training to meet participating employer demand.

This Amendment will:

- Increase the Agreement amount by \$348,877, from \$600,600 to \$949,477
- Increase the In-Kind amount by \$401,300, from \$691,200 to \$1,092,500
- Decrease number of trainees by 1, from 600 to 599
- Increase Support Costs by \$22,421, from \$39,000 to \$61,421

## **RECOMMENDATION**

Staff recommends approval of this Amendment.

## **CURRENT CONTRACT PERFORMANCE**

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

Agreement No.	Approved Amount	Term	No. Trainees (Average)	No. Completed Training	No. Retained
ET18-0158	\$600,600	01/25/18 – 01/24/20	600	335	92

Based on ETP Systems, 17,482 reimbursable hours have been tracked for earnings of \$486,027 (81% of approved amount). The Contractor projects final earnings of 100% of the current Agreement amount by October 2018 based on training currently committed to employers and training in progress.

**ACTIVE PROJECTS**

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0405	\$899,712	01/28/17 – 01/27/19	1000	860	468

Based on ETP Systems, 32,021 reimbursable hours have been tracked for earnings of \$889,543 (99% of approved amount). The Contractor projects final earnings of 99% based on training and retention completed to date.

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

8-240

Trainees may receive any of the following:

**ADVANCED TECHNOLOGY**

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

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

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





Training Proposal for:
Armanino Foods of Distinction, Inc

Small Business

ET19-0233

Approval Date: August 29, 2018

ETP Regional Office: San Francisco Bay Area

Analyst: S. Wang

CONTRACTOR

- Type of Industry: Manufacturing
Priority Industry: [X] Yes [ ] No
Number of Full-Time Employees
California: 33
Worldwide: 40
Number to be trained: 32
Owner [ ] Yes [X] No
Out-of-State Competition: NAICS Code Eligible
Special Employment Training (SET): [ ] Yes [X] No
High Unemployment Area (HUA): [ ] Yes [X] No
Turnover Rate: 6%
Repeat Contractor: [X] Yes [ ] No

FUNDING

- Requested Amount: \$10,816
In-Kind Contribution: \$13,792

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate SB <100	Business Skills, Computer Skills, HazMat, Mfg. Skills	32	8-60	0	\$338	\$18.22
				Weighted Avg: 13			

- Reimbursement Rate: \$26 Small Business Rate
- County(ies): Alameda
- Occupations to be Trained: Administration, Accounting, Maintenance, Managers, Operations, Production, QA, R&D, Sanitation, Warehouse
- Union Representation:  Yes  
 No
- Health Benefits: \$1.72 per hour

**SUBCONTRACTORS**

- Development Services: N/A
- Administrative Services: N/A
- Training Vendors: Toyota Material Handling of Livermore will provide Manufacturing Skills training on Forklift.

**OVERVIEW**

Founded in 1986 and located in Hayward, Armanino Foods of Distinction, Inc. (Armanino) (<http://www.armaninofoods.com/>) develops, manufactures and markets a variety of food products, with a focus on frozen pesto, sauces, pasta and meatballs. Armanino conducts research and development for its own products, and external clients such as foodservice and processed food manufacturers. Armanino's products can be found in supermarket chains in the Western United States; and through food services distributors such as Sysco Foods and US Foods.

**Training Plan**

This will be Armanino's second ETP Agreement, and the second in the last five years. Previous ETP-funded training focused on the Company's expansion into "ready-to-use" sauces. This initiative required the Company to modify the manufacturing area by adding a clean room and new equipment. The expansion was scheduled to start December 2016, with an estimated completion date of April 2017. Due to construction and equipment installation delays, the project

was not completed until August 2017. After some new equipment was installed, Armanino was able to deliver some of its planned training. However, it did not have time to deliver training on remaining equipment pending installation. Therefore, training in this proposal will be a continuation of the Company's previous training curriculum. No training will be duplicated from the prior agreement.

New equipment includes box folding equipment (case erectors), labeling, and pouch machines, resulting in increased production process. In addition, Armanino will replace antiquated manual form processing through the implementation of a software program resulting in the streamlining and automation of daily manufacturing production procedures.

Training will be delivered via Class/Lab in the following:

**Business Skills:** Training will be offered to all occupations in Conflict Management, Effective Communication and Teambuilding. This will allow staff to increase team cooperation and collaboration when performing tasks.

**Computer Skills:** Training will be offered to Administration and Accounting Staff in Microsoft Excel and the sales software, G2 Analytics. This training will help staff increase skills in Excel and sales functions.

**Hazardous Materials:** Training will be provided to Production, Warehouse, Sanitation, Maintenance, QA and Operations staff. Training will include Hazardous Materials and Bloodborne Pathogens. This training will provide staff with safety skills in proper procedures when handling hazardous materials.

**Manufacturing Skills:** Training will be offered to Production, Warehouse, Sanitation, Maintenance, QA and Operations staff in GMP HACCP (Hazard Analysis and Critical Point) Awareness, Food Safety, Allergen Awareness and Standard Operating Procedures. This training will allow for better understanding when operating the new equipment.

## **Training Infrastructure**

Armanino is ready to start training upon approval. The HR Manager will oversee training delivery, schedule training, and collect and maintain rosters. Training will be delivered by in-house experts and vendor as needed.

## **RECOMMENDATION**

Staff recommends approval of this proposal.

## **PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET17-0290	Hayward, CA	11/11/16 – 05/10/18	\$18,122	\$10,950 (60%)

Low performance was due to the delay in construction and equipment installation. A six-month extension was approved; however, some machinery training did not occur. All equipment has been installed and a training plan has been developed. The Company has right-sized this proposal to the amount earned in the previous Agreement.

**Exhibit B: Menu Curriculum**

**Class/Lab Hours**

8-60 Trainees may receive any of the following:

**BUSINESS SKILLS**

- ✚ Conflict Management
- ✚ Effective Communication
- ✚ Team Building

**COMPUTER SKILLS**

- ✚ Crystal Reports
- ✚ Genesis
- ✚ Microsoft Excel (Basic, Intermediate and Advanced)
- ✚ Sales Software
  - G2 Analytics Software

**HAZARDOUS MATERIALS**

- ✚ HazMat
- ✚ Sanitation
  - Bloodborne Pathogens (facilities cleaning)

**MANUFACTURING SKILLS**

- ✚ Allergen Awareness
- ✚ Food Defense
- ✚ Food Safety
- ✚ Forklift Training
- ✚ GMP HACCP (Hazard Analysis and Critical Point) Awareness
- ✚ Hold and Release
- ✚ Incorporating Formula Changes
- ✚ New Machinery training
- ✚ Recall & Traceability
- ✚ Standard Operating Procedures

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

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

**DELEGATION ORDER**



**Retrainee - Job Creation  
Training Proposal for:**

**Art Hild Body and Frame Incorporated dba Hild Collision  
Center**

**Small Business**

**ET19-0216**

**Approval Date:** August 14, 2018

**ETP Regional Office:** Sacramento

**Analyst:** J. Dongallo

**CONTRACTOR**

- Type of Industry: Services
  - Number of Full-Time Employees
    - California: 65
    - Worldwide: 65
    - Number to be trained: 65
  - Out-of-State Competition: No OSC
  - Special Employment Training (SET):  Yes  No
  - High Unemployment Area (HUA):  Yes  No
  - Turnover Rate: 7%
  - Repeat Contractor:  Yes  No
- Priority Industry:  Yes  No
- Owner  Yes  No

**FUNDING**

- Requested Amount: \$69,160
- In-Kind Contribution: \$56,997

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET SB <100 HUA	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, HazMat, PL-Comm Skills	48	8-200	0	\$1,170	*\$12.53
				Weighted Avg: 45			
2	Retrainee Job Creation Initiative SB <100 HUA SET	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, HazMat, PL-Comm Skills	10	8-200	0	\$1,300	*\$11.00
				Weighted Avg: 50			

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

- Reimbursement Rate: \$26 SB Priority
- County(ies): Shasta
- Occupations to be Trained: Administrative Staff, Repair Planner Staff, Parts Staff, Technicians, Detailers, Managers, Owners
- Union Representation:  Yes  
 No
- Health Benefits: Job #1: \$1.53 per hour

**SUBCONTRACTORS**

- Development Services: Synergy Management Consultants, LLC of Grass Valley, assisted with development for a flat fee of \$3,990.
- Administrative Services: Synergy Management Consultants, LLC will also provide administrative services for a fee not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

**INTRODUCTION**

Founded in 1990 and located in Redding, Art Hild Body and Frame Incorporated dba Hild Collision Center (HCC) ([www.hildcollisioncenter.com](http://www.hildcollisioncenter.com)) is a full service automotive repair center. The Company specializes in automotive mechanical, comprehensive and collision repair services, including the sale of parts and accessories. HCC’s customer base includes residents of Redding and the surrounding Shasta County area. This will be the Company’s first ETP Agreement. Training will take place at HCC’s Redding location.

## **PROJECT DETAILS**

To remain competitive in the collision repair industry and to acquire new business, HCC's staff will require training in Inter-Industry Conference on Auto Collision Repair, Automotive Service Excellence, and manufacturer specific trainings. The Company will also train on sales, customer service, negotiation, and other business skills to promote high-level customer satisfaction.

Additionally, in recent years, the automobile industry has moved towards changing the materials that are used to manufacture automobiles, using aluminum, boron and ultra-high strength steels. These new automotive materials require new welding equipment as well as new welding techniques to successfully complete repairs. In addition, HCC technicians are required to service Electric and Hybrid smart system vehicles, which requires specialized repair methods. New materials and processes have impacted the overall cost of service calculation impacting the duties of repair planners. Training will ensure staff can identify and properly price services.

### **Retrainee - Job Creation**

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

HCC has grown in the past 2 years, as the Company has already hired 15 new employees. The Company is expecting continued growth in the next few years. The Company will be expanding business capacity by hiring 10 new employees (Job Number 2). HCC will need to train newly hired administrative staff, repair planners and technicians on service requirements for various customer vehicle brands.

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

### **Training Plan**

Training will be delivered via class/lab and Productive Lab by in-house experts and vendors as needed in the following:

**Business Skills:** Training will be provided to Administrative Staff, Repair Planners, and Managers. Training will focus on efficiency and will provide staff with the skills to operate the business effectively. Training topics include Customer Care Skills, Advanced Sales & Marketing Skills, Conflict Resolution, and Communication Skills.

**Commercial Skills:** Training will be provided to Technicians, Repair Planners, Parts Staff, and Managers. Training will focus on maintenance service, new vehicle smart system technologies, ICAR credentials, damage assessments, and specialized in-service management systems. Training will include courses such as I-CAR Collision Repair Certification Skills, Structural Repair, Refinishing Skills, Non-Structural Vehicle Repair Skills, Estimating Skills, Alternative Fuel and Hybrid Vehicle Repair Diagnostics, and Original Equipment Manufacturer (OEM) Knowledge/Skills.

**Computer Skills:** Training will be provided to all occupations. Training will focus on software training to improve cost tracking, production planning, estimation quotes, and service flow. Training topics will include courses such as CCCOne Software, Mitchell and Mitchell Repair Center Software, and ALLDATA Software.

**Continuous Improvement:** Training will be provided to all occupations. Training will focus on improving quality, cycle time, and cost efficiency. HCC is implementing Lean quality and production improvement systems to increase efficiency by 15%. Training topics will include courses such as Leadership Skills, Root Cause Analysis, Lean Concepts, Teambuilding, Process/Quality Improvement, Process Design, and Inventory Control.

**Hazardous Materials:** Training will be provided to Technicians and will focus on the handling and disposal of automotive hazardous materials. Training topics will include Completing Material Safety Data Sheets (MSDS), Volatile Organic Compound (VOC) Tracking, and Emergency Clean-up.

### **Productive Laboratory (PL)**

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

HCC will train Technicians, Repair Planners, Parts Staff, and Managers on resistance spot welder, mig (metal inert gas) welder, frame rack and measuring system, paint spray guns, paint spray booths, and various hand tools. Staff will be trained on job duties such as structural parts welding, aluminum repair, glass replacement, plastic repair, and system diagnostics and repair.

PL training is necessary to ensure safety and industry standards are met. The subject-matter expert will walk the trainee through the repair process. The trainer will observe trainees performing tasks and offer coaching and mentoring throughout the process. Output is expected to decrease by 25-30% during PL. The trainer or subject matter expert will attest to the trainee's competency at the end of the PL training. Training will be under constant supervision with a 1:1 trainer-to-trainee ratio. Trainees will receive up to 24 hours of PL.

### **SET/HUA**

SET trainees are required to meet the Statewide Average Hourly Wage of \$30.36. However, the Company is located in Shasta County, an HUA with unemployment exceeding the state average by at least 25%. HUA trainees may earn the Reduced Standard Wage of \$12.53 per hour (Job Number 1) and \$11.00 per hour (Job Number 2) rather than the statewide average hourly wage.

### **Training Infrastructure**

HCC has a detailed training plan in place and is ready to begin training upon approval. HCC's two dedicated Owners and a Staff Manager will plan and oversee all aspects of training. The Staff Manager will coordinate and schedule training and ensure record-keeping compliance. In addition, the Company has retained Synergy Management Consultants to assist with administration

### **RECOMMENDATION**

Staff recommends approval of this proposal.



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

8-200 Trainees may receive any of the following:

**BUSINESS SKILLS**

- Advanced Closing Techniques
- Advanced Sales & Marketing Skills
- Closing Sales
- Communication Skills
- Conflict Resolution
- Customer Care Skills
- Customer Engagement
- Customer Relationship Building
- Customer Retention
- Distribution Requirements Planning (DRP) Management
- Negotiation Skills
- Presentation Skills
- Sales Procedures & Strategies

**COMMERCIAL SKILLS**

- Adhesive Bonding
- Advanced Materials
- Advanced Vehicle Systems
- Advanced Vehicle Systems
- Alternative Fuel & Hybrid Vehicle Repair Diagnostics
- Aluminum Cosmetic Damage
- Aluminum Repair Processes
- Aluminum Welding
- Blending Techniques
- BluePrint Supplemental Damage Assessment
- Color Theory & Tints
- Composite Materials and Bonding Techniques
- Composite Repair
- Corrosion Protection Process
- Damage on Non-Drivable Vehicles
- Diagnose Wind Noise & Water Leaks
- Electrical/Mechanical Systems
- Estimating Skills
- Glass Replacement
- Heating Cooling and AC Systems
- High Strength Steels
- I-CAR Collision Repair Certification Skills
- Metal Inert Gas (MIG) Welding
- New Technologies
- Non-Structural Vehicle Repair Skills
- OEM (Original Equipment Manufacturer) Knowledge/Skills
- Paint Spray Guns Maintenance & Set-up
- Pillars, Rocker Panels, Rails, Front Structures & Floor Pan Replacement
- Pre-Post Scanning/ Computer Recalibration

- Product Knowledge
- Refinishing Skills
- Remove & Install Trim & Hardware
- Repair & Replacement of Outer Body Panels
- Sand, Buff & Detail
- Service Procedures & Scheduling
- Spot Welding
- Stationary Glass
- Steering & Suspension System Damage Analysis
- Steering & Suspension Systems
- Straightening Structural Damage
- Structural Repair
- Surface Preparation
- Three-Dimensional Measuring
- Trim & Hardware
- Unibody Alignment
- Vehicle Operation, Maintenance, & Troubleshooting
- Vehicle Priming/Sealing

### **COMPUTER SKILLS**

- ALLDATA Software
- CCC Info Systems Software
- CCCOne Software
- Internal & External Customer Communication
- Job Costing
- Microsoft Office Suite – Intermediate and Advanced
- Mitchell & Mitchell Repair Center Software
- Parts Check in Posting
- Production Flow
- Production Planning – ETA Times & Dates
- Profit Net Software
- Quickbooks

### **CONTINUOUS IMPROVEMENT**

- Inventory Control
- Leadership Skills
- Lean Concepts
- Problem Solving/Decision Making Skills
- Process Design
- Process/Quality Improvement
- Root Cause Analysis
- Standard Operating Procedures
- Teambuilding

### **HAZARDOUS MATERIALS**

- Completing Material Safety Data Sheets (MSDS)
- Emergency Clean-Up
- Registration, Evaluation of Chemical Substances
- Volatile Organic Compound (VOC) Tracking

**Productive Lab Hours**

0-24 Trainees may receive any of the following:

**COMMERCIAL SKILLS** (1:1 ratio)

- Alignment Process for Full Frame Vehicles
- Alignment Process for Unitized Vehicles
- Aluminum Repair
- Body Filler Methods
- Color Tinting
- Estimates Direct Repair Program (DRP) Skills
- Estimating System Software Skills
- Measuring Vehicle Structures
- Mig Brazing Techniques
- Mig Welding
- Plastic Repair
- Resistance Spot Welder Techniques
- Spraying/Blending Techniques
- Technical Estimating Skills

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



**Training Proposal for:**  
**Associated Microbreweries, Inc. dba Karl Strauss**  
**Brewing Company**

**Delegation ≤ \$75,000 Single Employer**

**ET19-0238**

**Approval Date:** September 6, 2018

**ETP Regional Office:** San Diego

**Analyst:** C. Clady

**CONTRACTOR**     [www.karlstrauss.com](http://www.karlstrauss.com)

- Type of Industry: Manufacturing Food Processing (E)  
Manufacturing (33)  
Priority Industry:  Yes  No
- Number of Full-Time Employees  
California: 118  
Worldwide: 118  
Number to be trained: 97
- Out-of-State Competition:  Yes  No
- Special Employment Training (SET):  Yes  No
- High Unemployment Area (HUA):  Yes  No
- Turnover Rate: 19%
- Repeat Contractor:  Yes  NO

**FUNDING**

- Requested Amount: \$73,138
- In-Kind Contribution: \$75,950

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	ETP Required Wage
				Class / Lab	CBT		
1	Priority Retrainee	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, PL-Mfg. Skills	97	8-200	0	\$754	\$17.03
				Weighted Avg: 29			

- Reimbursement Rate: \$26.00 Priority/ Program Initiatives
- County(ies): San Diego
- Occupations to be Trained: IT, Production Staff, Human Resources, Sales, Marketing, Managers, Logistics, Restaurant Operations, Accounting, Events
- Union Representation for Trainees:  Yes  No
- Health Benefits: (Employer Paid to Meet ETP Wage)  No  Yes  
Up to \$2.50 /hour may be included to meet ETP Required Wage for Job# 1

**OVERVIEW**

<b>Year Company Founded:</b>	1989	<b>Company Headquarters:</b> <input checked="" type="checkbox"/> Single location San Diego, CA
<b>Facility location(s) where training will occur</b>		• <b>San Diego(San Diego County)</b>
<b>Nature of Business</b>		• Production, sales and distribution of beer
<b>Customer Base:</b>		• Bars, restaurants, grocery stores, private and private events

<p><b><i>Business / Industry Needs / Changes</i></b></p>	<p>The craft beer industry has seen exponential growth in California. California has over 900 craft breweries with new breweries opening weekly. More beer drinkers are expanding their palate and driving the craft beer market to become more competitive making it a 7.3-billion-dollar impact on the California economy.</p> <p>Karl Strauss is primarily a Southern California distributor, however, it plans to expand distribution to Northern California. The Company is acquiring a new building in San Diego to expand its manufacturing department with a new canning line.</p>
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**Training Plan:**

<p><b><i>Need for Training:</i></b></p>	<p>To meet customer demands and overall growth, Karl Strauss must keep up with technology and current processes and procedures.</p> <ul style="list-style-type: none"> <li>• The Company plans to roll out new software programs to assist with inventory/materials, including Client Relationship Management software to assist its sales team.</li> <li>• Productive Lab training will be provided to production staff on new equipment and respective production process.</li> <li>• Business skills will be offered to Managers, Marketing, Sales, Operations, and Production Staff. This training will enable marketing staff to increase sales and allow Managers and Product leads to better communicate with each other and customers.</li> <li>• As part of continuous improvement the Company recently launched Team Karl Brew Program for full time employees. This will allow non-brewing staff to go through the brewing process under the guidance of their brewers with the final product sold at a tasting room. This training may be provided to Human Resources, IT, Production, Marketing Restaurant Operations, Sales and Managers to help them gain a better understanding of their product.</li> </ul>
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Training courses listed in the Menu Curriculum will be provided via the following training method(s) under the following Types of Training:

- Class/lab     
  E-Learning     
  CBT     
  Productive Lab

<b>Business Skills</b>	<b>Continuous Improvement</b>	<b>Computer Skills</b>
<b>Manufacturing Skills</b>		
<b>Productive Laboratory</b>	<b>Justification:</b> <input checked="" type="checkbox"/> New Equipment <input checked="" type="checkbox"/> New Production Procedures <input type="checkbox"/> Certification Standards	
	<b>24 PL Hours per-trainee</b>	
	<b>Occupations Receiving PL Training:</b> Human Resources, IT, Production, Marketing, Restaurant Operations, Sales and Managers	
The PL instructor must be dedicated to training, at a ratio of 1:3.		
<b>Ratio Higher than 1:1</b>	1: 3 Production requires a team of three workers	

<b>Training Infrastructure &amp; Administrative Plan</b>	<ul style="list-style-type: none"> <li>• Coordination of Training (Oversight): The Learning Design &amp; Development Coordinator will oversee all administration and training implementation (coordinating &amp; scheduling).</li> <li>• Trainers: In-house experts and vendors as needed.</li> <li>• Administrative Duties: Training and Development Manager and the Human Resource department will handle project administration duties.</li> </ul>
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**Repeat Contract**

• <b>Number Of Agreements in last 5 years:</b>	2
• <b>Training provided / focus in last Agreement:</b>	<ul style="list-style-type: none"> <li>• Training focused on integrating sustainability processes, improving efficiencies and reducing waste.</li> </ul>
• <b>Difference in Training Plan:</b>	Training in this project will focus on software training. In addition, training under this proposal will include class room and productive lab training for new equipment and processes, including training for non-production staff.

**Prior Projects**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0130	San Diego	10/01/15- 9/30/17	\$52,380	\$52,380 (100%)
ET12-0342	San Diego	4/17/12- 4/16/14	\$49,248	\$38,367 (76%)

**RECOMMENDATION**

Staff recommends approval of this proposal and modifications

**SUBCONTRACTORS**

N/A



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

8-200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Accounting/Payroll System
- Change Management
- Marketing Strategies
- Sales Strategies
- Strategic Thinking

**COMPUTER SKILLS**

- Human Resource Management System
- Learning Management System
- Manufacturing System Training
- Intermediate Microsoft Office
- Intermediate Microsoft Excel
- Project Scheduler
- JLAN Training
- Client Relationship Management
- Vicinity Inventory/Materials Tracking

**CONTINUOUS IMPROVEMENT**

- Transformational Coaching
- Matching Your Leadership Style
- Introduction to Temperaments
- Self-Leadership & Diagnosis
- Diagnosing Others
- Interpersonal Communication
- Serving Beer
- Presentation Skills
- Needs & Values
- Relating to Temperaments
- One-on-One Conversations
- Listening for Results
- Understanding Beer Styles
- Flavor Interactions
- Every Day Negotiations
- Goal Setting
- Temperaments & Careers
- Understanding Career Development
- Building Trust
- Time Management
- Project Management
- Personal Branding
- Progressive Discipline
- Diversity & Inclusion
- Alignment Conversations

**MANUFACTURING SKILLS**

- Draft Tech Maintenance
- Beer Ingredients & Brewing Process
- Identify Off Flavors & Evaluation
- Keeping Beer
- Quality Management
- Distribution Process Practices
- Manufacturing Leadership
- Cost Concept (Purchasing, Pricing & Cost Negotiations)
- Risk Management
- Equipment Operations & Maintenance
- Good Manufacturing Practices
- Safety
- Environmental Impact

**Productive Lab Hours**

0-24

**MANUFACTURING SKILLS** (Ratio 1:3)

- Draft Tech Maintenance
- Beer Ingredients & Brewing Process
- Identify Off Flavors & Evaluation
- Keeping Beer
- Quality Management
- Distribution Process Practices
- Manufacturing Leadership
- Cost Concepts
- Risk Management
- Equipment Operations & Maintenance
- Good Manufacturing Practices
- Safety
- Environmental Impact

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

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



**DELEGATION ORDER**

**Training Proposal for:**

**Certified Aviation Services, LLC**

**Agreement Number: ET19-0215**

**Approval Date:** August 14, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** E. Wadzinski

**PROJECT PROFILE**

Contract Attributes:	SET Retrainee Priority Rate HUA Veterans	Industry Sector(s):	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		
Number of Employees in:	CA: 129	U.S.: 178	Worldwide: 178
<u>Turnover Rate:</u>	16%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$68,432		\$0	\$0		\$68,432

In-Kind Contribution:	100% of Total ETP Funding Required	\$210,000
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET Priority Rate HUA	Commercial Skills	175	8-200	0-192	\$364	\$22.77
				Weighted Avg: 14			
2	Retrainee Priority Rate SET Veterans HUA	Commercial Skills	13	8-200	0-192	\$364	\$22.77
				Weighted Avg: 14			

**Minimum Wage by County:** ETP SET (Priority Industry) Statewide hourly wage of \$22.77.  
**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 \$1.77 per hour may be used to meet the Post-Retention Wage for Job Numbers 1 & 2.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>JOB NUMBER 1 (SET/RETRAINEE)</b>		
A&P Mechanics		164
Frontline Supervisors/Managers		11
<b>JOB NUMBER 2 (SET/RETRAINEE/VETERANS)</b>		
A&P Mechanics		11
Frontline Supervisors/Managers		2

**INTRODUCTION**

Certified Aviation Services (CAS) ([www.certifiedaviation.com](http://www.certifiedaviation.com)), is a subsidiary of Aero-Mark, LLC. Founded in 1990, CAS is a leading provider of maintenance, repair and overhaul services that include airport line-maintenance for fleet operators around the world. CAS offers a wide range of aircraft and component services that provide customers innovative, cost-effective solutions. The Company is a certified Federal Aviation Administration (FAA) Part 145 Repair Station and European Aviation Safety Agency 145.6093. CAS’s customers are commercial passenger, cargo and private air carriers including: American Airlines, Hawaiian, United, Jet Blue, China Eastern, China Cargo, Air Canada, Air Bus, Boeing, Southwest, Spirit, WestJet, Virgin America, Virgin Airlines, Lufthansa and more.

CAS's corporate office is located in Ontario, and the Company has facilities at eight California airports (Los Angeles, Ontario, Long Beach, San Bernardino, San Francisco, San Diego, Sacramento and San Jose). ETP funded training will be provided at all CAS California facilities.

## **Veterans Program**

CAS is a Veteran owned company and supports Veteran employment. During the prior ETP Agreement, CAS hired and trained 10 Veterans. The Company continues working to attract more Veterans for employment through Job Fairs and other forms of outreach. CAS is including Veterans as part of this ETP project (Job Number 2). The Company will continue to focus efforts and resources on the hiring of veterans - working with the Veterans Authority and other government agency sources to help find qualified veteran A&P trainees as needed.

## **PROJECT DETAILS**

This will be CAS's second ETP Agreement, the second in the last five years. Training in the prior Agreement focused on new equipment/technology training, primarily simulator-based training. During the term of the Agreement the Company experienced some changes in their leadership team. This led to the need for CAS to reassess their overall training strategy. The outcome of this assessment determined the need of a fundamental and philosophical shift in CAS's training program; negating the need to perform simulator-based training.

During CAS's reassessment, the Company realized that competitors are keeping pace with rapid advances in technology through the use of Computer Based Training (CBT) as an alternate way to meet customer requirements. CBT has become an integral part of how CAS Airframe & Power Plant (A&P) Mechanics and Technicians are being trained. CAS's training plan now implements CBT in conjunction with class/lab training for employees from the time they are hired, and throughout their employment. The self-paced CBT delivery method allows CAS's frontline workers to participate in training during the work day at a time that it best meets their job schedule or demand.

In this proposal, CAS will train A&P Mechanics to receive a certificate of completion to service various Aircraft Systems. Training is critical for CAS to obtain new contracts to expand; and to retain business and employees. Training will consist of Class/Lab and CBT in Commercial Skills. Training will include the familiarization of various FAA, airline and/or airport requirements, operations and procedures. Aircraft System Courses will be provided by way of Class/Lab and/or CBT, depending on customer requirements. CBT training is generally provided to trainees to supplement/complement instructor-led training, but there may be some instances where some trainees receive 100% CBT.

## **Training Plan**

CAS training delivery methods will include Class/Lab and Computer-Based Training (CBT). Class/Lab training will be provided by CAS trainers, or training vendors as needed. The Company is utilizing CPAT Aviation Training Solutions (CPAT.com) as their tool for CBT training on Aircraft Systems.

**Commercial Skills** – Training will be offered to A&P Mechanics and Frontline Supervisors and Managers. This training is designed for professionals in the aviation maintenance and repair industry. These technical courses include General Aviation, Aircraft Competency, Human Factors, Respirator and confined space training, De-icing and Anti-icing, FAA parts requirements, Lightning strike awareness, ETOPS training (Extended Twin Engine Performance Standards), RVSM training (Reduced Vertical Separation Minimums), LMP training (Lower Minimum Program), 1<sup>st</sup> Stage Fan Blade Inspection and Repair training, Hydraulic

Systems, Thrust Reversal Lockout training, Emergency Evacuation Systems and Oxygen Bottle Servicing training.

### **Computer-Based Training**

CPAT Aviation Training Solutions provides training for specific types of aircraft. CAS has found this to be a useful tool for trainees to be more competent and ready to work on a variety of aircraft. Each course is customized for each aircraft type and specific components. A trainee will receive a certificate of completion at the end of each type of training. These CBT courses allow CAS to customize training as necessary to ensure trainees are ready to work on equipment based on customer/business demand.

Approximately 20% of trainees may receive up to 192 hours of CBT training. Self-paced CBT will allow frontline workers to receive training based on work schedule and their availability to train. CBT will supplement planned, instructor-led learning in an effort to ensure a solid understanding of concepts presented.

### **Commitment to Training**

CAS spends approximately \$350,000 a year on training. The Company provides safety training and new employee orientation skills. ETP funds will not displace existing financial commitments to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

#### ➤ Training Infrastructure

The Director of Human Development, Training Director and Training Assistant will oversee the ETP project. The Training Assistant, along with three CAS trainers, will be responsible for managing, scheduling, and documenting training. The Company has also retained California Training Coalition (CTC) to assist in administrative duties.

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

### **Impact/Outcome**

A&P Mechanics will attain certificates to be allowed to work on specific types of aircraft. The industry and competitive nature of these services demands that A&P Mechanics are cross-trained for at least four different aircraft in order to be productive in any given eight-hour shift.

### **High Unemployment Area**

Trainees in San Bernardino County work in a High Unemployment Area (HUA), with unemployment exceeding the state average by 25%. However, CAS is not asking for an HUA wage modification.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0411	Ontario	06/30/16 – 06/29/18	\$492,000	\$69,846 (14%)*

\*During the term of the Contract, CAS lost their main trainer and had a change in leadership which halted training. Additionally, after reassessing planned training, it was determined that most of the scheduled training could not occur due to the need to use flight simulator equipment to which CAS had limited access. CAS deemed it more cost effective to provide CBT training while they revised their training program.

To ensure success in this new proposal, CAS has strong leadership to oversee training. CAS hired a Director, Human Resources & Development and a Human Resources Representative. This plan is much more conservative and utilizes more cost effective training methods than in the prior Agreement. The training team includes a Training Director and trainers, including two full-time trainers located at CAS's largest station in LAX.

**DEVELOPMENT SERVICES**

CAS utilized the services of California Training Coalition in Upland to assist with development of this proposal with no charge.

**ADMINISTRATIVE SERVICES**

California Training Coalition 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:

**COMMERCIAL SKILLS**

- Aircraft stems & GEN –FAM courses
- Aircraft Towing
- Aircraft Brake Riding
- Air Conditioning
- Auto Flight
- Communication System
- Electrical Power System
- Fire Protection
- Flight Control System
- Fuel System
- ETOPS (Extended Twin Engine Performance Standards)
- RVSM (Reduced Vertical Separation Minimums)
- LMP (Lower Minimum Program)
- 1st Stage Fan Blade Inspection and Repair
- Thrust Reversal Lockout
- Emergency Evacuation System
- Hydraulic System
- Anti-Ice System
- Instruments
- Landing Gear
- Lighting Systems
- Navigation System
- Oxygen System
- Oxygen Generator Replacement Safety
- Pneumatic System
- Water & Waste System
- Fuel Entering System
- Airborne APU System
- Doors/Windows
- Power Plants
- Rigging
- EWIS (Electrical Wiring Interconnect Systems)
- SFAR 88 (fuel tank integrity safety)
- Fuel tank inerting safety
- Bore scope inspection
- IDG Servicing (engine generator service)
- Aircraft Simulator
- Towing Aircraft
- Brake Riding
- Human Factors Training
- Hazcom
- Hazmat
- Respirator



- Fuel Tank Entry / Confined Space
- Lightning Strike Awareness
- De-icing / Anti-Icing
- Oxygen Bottle Servicing
- Nitrogen Bottle Servicing
- Jacking Aircraft
- FAA SUPS / Unapproved Parts
- CAS INDOC
- CAS SOP
- Drug and Alcohol Training
- EASA MIP Training
- QSM Manuals
- Qualtrax Training
- How to use CPAT /CBT Training
- Acumen on Tablets
- Boom Lift Training
- Fork Lift training
- Dent Mapping
- Aircraft Tire Changing
- Etops Training
- RVSM Training
- ARA / RII Training
- LMP Training
- Airline Service Checks
- Air Craft Leveling & Weighing
- Dry Wash Training
- Overall Test – Competency for each type of aircraft
- Human Factors training
- Hazmat – Caustic Materials
- Human Factors training
- Respirator and confined space training
- Airport SIDA training
- Airport Driving training
- Lightning strike awareness training
- Oxygen Bottle Servicing training
- Airport surface movement training
- Advanced Avionics/Aircraft Systems training for:
  - B-727-100/200
  - B-737-200/300/400/500
  - B-737-700/800/900
  - B-737 Classic to NG Differences
  - B-737 NG to Classic Differences
  - B-737-700/800/900 Differences
  - B-737 NG to MAX Differences
  - B-737 MAX Course
  - B-747-400 PAX
  - B-747-400 F
  - B-747-400 to 800 Differences
  - B-747-800 PAX
  - B-747-800 F
  - B-757-200

- B-757-300
- B-757-200 to 300 Differences
- B-757 to B-767 Differences
- B-767-300 & ER
- B-767-300F
- B-777-200 ER
- B-777-300ER
- B-777-to B-787 Differences
- B-787-800/900/10
- B-767-200
- A-320
- A-330
- A-380
- MD-11
- EMB-170/190

**CBT Hours**  
0-192

**COMMERCIAL SKILLS**

- B-727-100/200 - 32 hours
- B-737-200/300/400/500 - CL- 32 hours
- B-737-700/800/900 – NG - 32 hours
- B-737 Classic to NG Differences - 32 hours
- B-737 NG to Classic Differences - 32 hours
- B-737-700/800/900 Differences - 32 hours
- B-737 NG to MAX Differences - 32 hours
- B-737 MAX Course - 32 hours
- B-747-400 PAX - 32 hours
- B-747-400 F - 32 hours
- B-747-400 to 800 Differences - 32 hours
- B-747-800 PAX - 32 hours
- B-747-800 F - 32 hours
- B-757-200 - 32 hours
- B-757-300 - 32 hours
- B-757-200 to 300 Differences - 32 hours
- B-757 to B-767 Differences - 32 hours
- B-767-300 & ER - 32 hours
- B-767-300F - 32 hours
- B-777-200 ER - 32 hours
- B-777-300ER - 32 hours
- B-777-to B-787 Differences - 32 hours
- B-787-800/900/10 - 32 hours
- B-767-200 - 32 hours
- A-320 - 32 hours
- A-330 - 32 hours
- A-380 - 32 hours
- MD-11 - 32 hours
- EMB-170/190 - 32 hours

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



**Training Proposal for:  
Diamond Technologies, Inc.**

**Delegation  $\leq$  \$75,000 Single Employer**

**ET19-0230**

**Approval Date:** August 29, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** M. Webb

**CONTRACTOR** [www.diamonddit.pro](http://www.diamonddit.pro)

- Type of Industry: Technology/IT Services  
Priority Industry:  Yes  No
- Number of Full-Time Employees  **Small Business**
  - California: 30
  - Worldwide: 30
  - Number to be trained: 36Small Business Only:  
Owner  Yes  No
- Out-of-State Competition:  Yes  No
- Special Employment Training (SET):  Yes  No
- High Unemployment Area (HUA):  Yes  No  
  
36 Number of trainees in HUA location
- Turnover Rate: 15%
- Repeat Contractor:  Yes  No

**FUNDING**

- Requested Amount: \$28,080
- In-Kind Contribution: \$23,400

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	ETP Required Wage*
				Class / Lab	CBT		
1	Retrainee SB<100 Priority Rate	Business Skills Computer Skills Continuous Improvement	20	8-200	0	\$780	\$16.70
				Weighted Avg: 30			
2	Retrainee SB<100 Priority Rate HUA	Business Skills Computer Skills Continuous Improvement	10	8-200	0	\$780	*\$12.53
				Weighted Avg: 30			
3	Retrainee SB<100 Job Creation Initiative HUA	Business Skills Computer Skills Continuous Improvement	6	8-200	0	\$780	*\$11.00
				Weighted Avg: 30			

\*ETP Required Wage floats down to a High Unemployment Area wage modification if trainees in Job number are located in an HUA, regardless if they are requesting a wage modification. It will be made a condition of contract that the trainees will never be paid less than the statewide or local minimum wage rate in effect at the end of retention regardless of wage expressed in this table & Contract.

- Reimbursement Rate: Job #'s 1-3: \$26 Priority/Program Initiatives
  
- County(ies): Kern
- Occupations to be Trained: Administration Staff, Support Administration-Dispatch, Sales Staff, Service Technicians, Accounting Staff, Project Management
- Union Representation for Trainees:  Yes  No
  
- Health Benefits: (Employer Paid to Meet ETP Wage)  No  Yes  
Up to \$2.50 per hour may be included to meet ETP Required Wage for Job# 1 and up to \$1.53 in Job Number 2.
- Turnover Rate Justification for Waiver  
N/A

**OVERVIEW**

<b>Year Company Founded:</b>	1997	<b>Company Headquarters:</b> <input checked="" type="checkbox"/> <i>Single location</i>
<b>Facility location(s) where training will occur</b>		Bakersfield (Kern County)
<b>Nature of Business</b>		An Information Technology (IT) services and solutions provider.
<b>Customer Base:</b>		School systems, oil companies, health industries, agriculture companies, law firms, and any business who require IT solutions.
<b>Business / Industry Needs / Changes</b>		The IT industry continues to change with rapid technology growth, new standards, and a need to train workers in new positions. To continue to meet the needs of customers, Diamond Technologies has developed a training plan to educate its staff on new updates and computer technologies.

**Training Plan:**

<b>Need for Training:</b>	<p><b>New and updated Computer Software:</b> With security threats elevated the last few years (Sony and Equifax breach), company's such as Diamond Technologies work to combat viruses and data hostage situations with additional conversions, back-ups, and training to incorporate new software. Service Technicians and Sales Staff will receive training on ransom ware software programs and new algorithms that will protect the customer. Training will be provided on softwares such as Next Generation Intrusion Prevention Systems (NGIPS), Source Fire, and other anti/spam software.</p> <p><b>Process Improvement:</b> Training in Business Skills, Computer Skills, and Continuous Improvement will be delivered to improve worker skills and standardize processes to further align training across all departments within the company.</p>
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Training courses listed in the Menu Curriculum will be provided via the following training method(s) under the following Types of Training:

- Class/lab     
  E-Learning     
  CBT     
  Productive Lab

<b>Business Skills</b>	<b>Computer Skills</b>	<b>Continuous Improvement</b>
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<b>Job Creation Justification</b>	<input checked="" type="checkbox"/> Expanding existing business capacity by adding newly-hired employees to an existing function.
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<b>Training Infrastructure &amp; Administrative Plan</b>	<p><b>Coordination of Training (Oversight):</b> The Company's Controller will manage implementation and administration of this Agreement.</p> <p><b>Trainers:</b> Training will be delivered by in-house instructors.</p> <p><b>Administrative Duties:</b> The Controller will work alongside the hired third party administrator (see below), to complete enrollment, track training hours, perform data entry, and manage the invoice process.</p>
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**RECOMMENDATION**

Staff recommends approval of this proposal and modifications

**SUBCONTRACTORS**

Subcontractor Type	Subcontractor Name	City	Cost / %
• Development	Judith's Training Services, LLC	Los Angeles	\$ 3,400
• Administrative	Judith's Training Services, LLC	Los Angeles	Not to exceed 10% of earned amount
• Training Vendors			N/A

**Exhibit B: Menu Curriculum**

**Trainees may receive any of the following:**

**Class/Lab Hours**

8-60

**BUSINESS SKILLS**

- Accounting/Presales Engineer Accounting
- Business Admin/Planning
- Business report writing and editing
- Coaching Procedure
- Communications
- Compliance
- Credit Card Sales/Transactions,
- Customer needs
- Dispatching services
- Financial Strategy/Forecasting
- Happy Talk (power point)
- Interpersonal Skills – cross cultural comprehension
- Inventory Control
- Leadership/coaching
- Marketing
- Monitoring
- Negotiating
- Payroll
- PMP – Project Management Professional training
- Pricing Methodology
- Prince II
- Product Knowledge
- Sales
- Service Development
- Strategic Planning, Evaluations, Monitoring
- Telecommunications
- Telephone Skills
- Time/vendor Management

**COMPUTER SKILLS**

- Advanced Adobe Design
- Advanced Microsoft Excel (Macros, PivotTables, Charts and More).
- Advanced Quick books
- Alert Logic software
- AMP, Advanced Malware Prevention
- Auto Cad Training (CAD/CAM)
- Back-ups, Firewalls
- Competency
- Computer Networking (Hardware/Software)

- CISCO Certified Network Administrator (CCNA)
- Certified Network Engineer (CNE)
- Certified Novell Assistance (CAN)
- Hypervisors
- Lab Tech Training
- Local Area Networks (LAN)
- Microsoft Certified Systems Administrator (MCSA)
- Metropolitan (MAN)
- Network Management
- Virtualization
- Wide (WAN)
- World Wide Web (WWW)
- Computer Programming
- Connect Wise
- Datto
- Dell Cisco software
- Document Management Training DRIVVE – MFILES
- E Set
- Firepower
- My IT Process
- NGITS, Next Generation Intrusion Prevention systems
- Ransom Software
- Scripting
- Share Point
- Source Fire
- Storage Craft
- Storage Craft
- True Methods
- VOIP (Voice Over IP),
- Watch guard

### **CONTINUOUS IMPROVEMENT**

- Assessments (Technical quality)
- Decision Making
- Driving standards
- Executive incentives
- Gross Margin training
- Leadership Skills
- Operations/workflow
- Process/procedure Improvement
- Production / project Scheduling
- Production /project
- Professional Services Automation – Tool Training
- Project Delivery Methodology
- Quality Concepts
- Team Building
- The Diamond Way
- Total Quality Management



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



**DELEGATION ORDER**

**Training Proposal for:  
Global Blood Therapeutics, Inc.  
Agreement Number: ET19-0226**

**Approval Date:** September 11, 2018

**ETP Regional Office:** San Francisco Bay Area

**Analyst:** C. Hoover

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Biotechnology/Life Sciences Services  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Mateo	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 145	U.S.: 153	Worldwide: 153
<u>Turnover Rate:</u>	8%		
<u>Managers/Supervisors:</u> (% of total trainees)	18%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$68,640		\$0	\$0		\$68,640

In-Kind Contribution:	100% of Total ETP Funding Required	\$124,238
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Commercial Skills, Computer Skills, Cont. Improv., HAZMAT, Mgmt. Skills, Mfg. Skills, OSHA 10/30	66	8-200	0	\$1,040	\$18.22
				Weighted Avg: 40			

**Minimum Wage by County:** \$18.22 per hour for San Mateo County.

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

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

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
Research Associate		10
Facilities Staff		2
Clinical Trials Assistant		2
Document Control Associate		1
Office Staff		10
QA Documentation Staff		1
Finance Staff		3
IT Specialist		1
Scientist		21
Supply Chain Analyst		1
Patent Staff		2
Manager		12

**INTRODUCTION**

Founded in 2011 and headquartered in South San Francisco, Global Blood Therapeutics (GBT) ([www.gbt.com](http://www.gbt.com)) is a clinical-stage biopharmaceutical company. GBT is committed to developing new therapies that can provide transformative clinical benefits to patients, specifically those with grievous blood-based conditions and underserved patient communities. ETP-funded training will be delivered at its sole South San Francisco facility.

Through GBT's drug discovery and development work, it is creating treatments that address the root causes of various blood-based disorders. Currently, GBT is developing its lead product candidate- Voxelotor as an oral, once-daily therapy for Sickle Cell Disease (SCD), which is the first and only SCD treatment to receive US Food and Drug Administration (FDA) Breakthrough Therapy (BT) designation. BT designation is a process designed to expedite the development and review of drugs that are intended to treat a serious condition. After FDA approval, GBT expects to use a third-party subcontractor to manufacture and to distribute its product via doctor samples, pharmacies and through direct-to-patient means.

ETP funding will provide needed training related to new research and innovations to help GBT achieve higher levels of product development. GBT has recently spent \$2.2 million (\$7 million in 2016 and 2017 combined) on new equipment of which installation was completed in December 2017. Training on new lab equipment including microscopes, informatics workstations, Agilent 1200 Series, polyblock system, Microfluidizer and autosampler will be delivered. This training is not included in the purchase price of the equipment.

## **PROJECT DETAILS**

ETP-funded training will help GBT become more globally competitive within the biotechnology industry. GBT conducted a formal-needs' assessment to provide the framework for its training plan. This included new developments, research results, Biotechnology Innovation Organization (BIO) principles, and Quality and Strength Finder assessments.

### **Training Plan**

The following will be delivered in Class/Lab and E-Learning:

**Business Skills:** Training will be delivered to Document Control Associate, Office Staff, Finance Staff, IT Specialist, QA Documentation Staff, Scientist, Patent Staff, Supply Chain Analyst occupations. Training will include Communication Skills, Project Management, Product Knowledge, Leadership, and Train-the-Trainer courses. Administrative and specialist positions will need train-the-trainer training to learn vital subject matter expertise, instructional expertise and how to transfer the knowledge to novice employees. Client-facing positions receive training on customer communication and product knowledge for future-order accuracy.

**Commercial Skills:** Training will be provided to Scientist, Research Associate, Clinical Associate, and Manager occupations. Training will include Clinical Skills, Model Building, Product Commercialization, Equipment Functions and Sarbanes-Oxley (SOX) courses to meet regulatory requirements, commercialization and R&D record keeping. Scientists and Clinical Associates will be trained on new lab equipment. Research Associates will receive Clinical Skills to perform biochemical assays for compound screening, develop new therapies and protect patient safety.

**Management Skills:** Training will be provided to Managers to enhance communication and leadership skills, support developmental planning, facilitate quality teambuilding, and to ensure Sarbanes-Oxley (SOX) documentation practices are followed in each department. Managers require training to enhance R&D-related and commercialization-related skills to champion new processes and regulatory requirements. Additionally, skills are required to develop teams to achieve quality operations while sustaining the creation, storage and maintenance of biological product and project information to support drug-discovery development.

**Computer Skills:** Training will be provided to Document Control Associate, Office Staff, Finance Staff, IT Specialist, and QA Documentation Staff occupations. Training will include HR Systems, Crystal Reports, Microsoft Office (Intermediate), and Manufacturing Resource Planning (MRP) courses. IT Specialists receive training on technology solutions, system configuration, and hardware/software inventory management to problem solve and support end-user technology.

**Manufacturing Skills:** Training will be delivered to Research Associate, Patent Staff, and Supply Chain Analyst occupations. Even though GBT does not conduct manufacturing, it must understand current good manufacturing practices (GMP) to take the entire life cycle of commercialization into account. GBT will not be including federally-mandated GMP within this project, since it needs to provide such training at its own cost.

**Continuous Improvement:** Analytical Development training will be provided to Document Control Associate, QA Documentation Staff and Research Associate occupations to maintain laboratory practices, adhere to scientific principles and regulations, analyze experimental data, and present scientific results at team research meetings. Quality Best Practices training will be implemented for all occupations to improve processes, efficiencies and learn best practices related to product development and commercialization to be in line with FDA regulations.

**Hazardous Materials:** Training will be provided to Scientist, Research Associate, Clinical Associate and Supply Chain Analyst positions. Curriculum will include Hazard Analysis Critical Control Point (HACCP) and Hazardous Communication courses for safe and effective research and development.

### **Certified Safety Training**

1. **OSHA 10/30:** Training will be provided to Research Associate, QA Documentation, Scientist, Supply Chain Analyst, managers and supervisors. Training will be provided by a certified OSHA trainer. This training is a series of courses “bundled” by industry sector and occupation. It consists of 10 hours of classroom or CBT training for journey-level workers and 30 hours for frontline supervisors. The coursework is geared to construction work, and also manufacturing. Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

### **Commitment to Training**

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.

GBT spends \$100,000 annually on training. Current training by GBT is delivered on mandatory state (sexual harassment/first-aid courses) and federal regulation, (mandated GMP courses for specific occupations, such as Q&A Documentation Staff and Scientists, that have contact with the drug are not included in this proposal), legal compliance, diversity and inclusion, conflict resolution, and hiring, firing and new-hire orientation. Its leadership occupations receive continuing education to ensure that certifications are kept up such as in accounting and legal, which is job-specific training. All occupations receive annual compliance training, which is delivered primarily through a company-wide, computer-based training (CBT) effort. All new-hire orientation and continuing education is provided via classroom or e-learning training delivery methods.

#### ➤ Training Infrastructure

With continued support from GBT’s executive staff (Chief Administrative Officer and the Controller), its Senior Accounting Manager (Contract Representative) will be the dedicated administrator. An experienced internal team- Quality Assurance Manager, HR Associate and three to five Managers (in-house trainers) will be responsible for training oversight, delivery and support while working with a third-party consultant- Economic Incentives Advisory Group (EIAG) to manage and track the project. EIAG is a three-member team who will support implementation, compliance, reporting and reimbursements/invoicing during the Agreement.

## **Impact/Outcome**

Upon completion of this training, four to five GBT trainees will earn OSHA 10/30 certification.

## **RECOMMENDATION**

Staff recommends approval of this proposal.

## **DEVELOPMENT SERVICES**

GBT retained Economic Incentives Advisory Group (EIAG) in Phoenix, AZ to assist with development of this proposal for a flat fee of \$5,148.

## **ADMINISTRATIVE SERVICES**

GBT also retained EIAG to perform administrative services in connection with this proposal for a fee not to exceed 11% of payment earned.

## **TRAINING VENDORS**

Strayer Consulting Group, Inc. of Los Gatos has been retained to provide Business Skills and Management Skills training for a fee of \$30,851. Other trainers will be identified for ETP record-keeping purposes, as they are retained by GBT.

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

8-200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Communication Skills
- Project Management
- Product Knowledge
- Train-the-Trainer

**COMMERCIAL SKILLS**

- Clinical Skills
  - Good Clinical Practices (GCP)
  - Clinical Data Management
  - Sickle Cell Disease Training
  - Blood Disease Training
- Best Practice in Model Building
- Lab Equipment Functions
  - Microscopes
  - Informatics Workstations
  - Agilent 1200 Series
  - Polyblock System
  - Microfluidizer
  - Autosampler
- Product Commercialization
- Sarbanes-Oxley (SOX)

**COMPUTER SKILLS**

- HR Systems
  - Fidelity System
  - NetSuite
- Microsoft Office (Intermediate)
- Manufacturing Resource Planning (MRP)

**CONTINUOUS IMPROVEMENT**

- Quality: Best Practices
- Analytical Development

**HAZARDOUS MATERIALS**

- Hazard Analysis Critical Control Point (HACCP)
- Hazardous Communication

**MANAGEMENT SKILLS (management trainees only)**

- Sarbanes-Oxley (SOX) for Managers
- Communication
- Developmental Planning
- Leadership Skills
- Coaching and Teambuilding

**MANUFACTURING SKILLS**

- Current Good Manufacturing Practices (GMP)

**OSHA 10/30 (OSHA Certified Instructor)**

- 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.





**DELEGATION ORDER**

**Training Proposal for:  
HWS Baseball IV, LLC dba Modesto Nuts Professional  
Baseball Club**

**Small Business**

**ET19-0227**

**Approval Date:** September 14, 2018

**ETP Regional Office:** Sacramento

**Analyst:** J. Dongallo

**CONTRACTOR**

- Type of Industry: Multimedia/Entertainment
- Priority Industry:  Yes  No
- Number of Full-Time Employees
  - California: 12
  - Worldwide: 12
  - Number to be trained: 12
- Owner  Yes  No
- Out-of-State Competition: No OSC
- Special Employment Training (SET):  Yes  No
- High Unemployment Area (HUA):  Yes  No
- Turnover Rate: 18%
- Repeat Contractor:  Yes  No

**FUNDING**

- Requested Amount: \$9,360
- In-Kind Contribution: \$21,000

**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 HUA	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement	12	8-60	0-8	\$780	*\$12.53
				Weighted Avg: 30			

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

- Reimbursement Rate: Job # 1: \$26 SB Priority
  
- County(ies): Stanislaus
- Occupations to be Trained: Marketing/Merchandising Staff, Operations Staff, Production Staff, Sponsorship Staff, Ticketing Sales Staff
- Union Representation:  Yes  
 No
- Health Benefits: Job #1: \$0.53 per hour

**SUBCONTRACTORS**

- Development Services: Strategic Business Solutions, LLC of Visalia assisted with development for a flat fee of \$655.
- Administrative Services: Startegic Business Solutions will also provide administrative services for a fee not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

**OVERVIEW**

Founded in 1946 and located in Modesto, HWS Baseball IV, LLC dba Modesto Nuts Professional Baseball Club (Modesto Nuts) ([www.modestonuts.com](http://www.modestonuts.com)) owns and operates the Modesto Nuts, a Class A baseball farm team affiliated with the Seattle Mariners Major League Baseball franchise. This baseball team plays at the historic John Thurman Ballpark in Modesto. The venue also provides professional baseball entertainment, high school playoffs, concerts, charitable events and other community activities. This is the Company’s first ETP Agreement. Training will take place at Modesto Nuts’ Modesto location.

## Need for Training

As the baseball industry becomes more complex and automated, local Baseball Farm Team affiliates are being required to maintain and comply with Major League Baseball standards while striving to be more efficient. In addition, local entertainment entities such as the Modesto Nuts must create a balance between providing a professional entertainment venue that is affordable to both sponsors as well as an average family. Modesto Nuts strives to reach this goal by providing staff with the necessary skills to utilize their SCORE Customer Relationship Management (CRM) software and ensuring staff can communicate effectively with sponsors and customers.

To maximize the value in products offered to the community and to increase market share, the Company will implement a comprehensive training plan to cross-train employees on computer and ticketing software, facility equipment, sales, marketing and social media. Modesto Nuts also plans to improve employee professionalism to promote a cohesive corporate culture through leadership and teambuilding training.

## Training Plan

Training will be delivered via Classroom/Laboratory and Computer-Based Training (CBT) by in-house subject matter experts. Training vendors may be utilized if needed.

**Business Skills:** Training will be offered to Marketing/Merchandising, Operations, and Ticketing Sales Staff to improve employee skills on marketing strategies, social media tools, promotion and packages, charitable presence and broadcast/print media. Training will increase sales and allow the organization to obtain a larger fan base. Training topics include Sales and Marketing, Social Media Marketing, and Ticketing Processes.

**Commercial Skills:** Training will be offered to all Operation and Production Staff to insure staff is prepared and organized for game day and special events. Trainees will receive training on Game Day Staff Management, Turf Maintenance, and Facilities Operation and Maintenance to ensure fluidity of events.

**Computer Skills:** Training will be offered to all occupations to increase efficiency between customers and vendors, improve ticket tracking, utilize smart phone ticketing functions, improve customer database, contact management and sales functions. Training topics include Ticket Return Software, SCORE CRM Software, and Website Development and Management.

**Continuous Improvement:** Training will be offered to all occupations to provide a cohesive workforce and promote a team environment. Select trainees will also receive leadership training to lead teams, coach, motivate and mentor staff to provide a better work environment and increase team morale. Training topics include Teambuilding, Leadership, and Coaching and Mentoring Skills.

## Computer-Based Training

Trainees will receive up to 8 total training hours per trainee of CBT training.

## **SET/HUA**

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

However, all trainees work in a High Unemployment Area (HUA) exceeding the state average by at least 25%. The Company's location in Stanislaus County qualifies for HUA status under these standards. Modesto Nuts is requesting a HUA wage modification to \$12.53 per hour.

## **Training Infrastructure**

Modesto Nuts has a detailed training plan in place and is ready to begin training upon approval. Modesto Nuts has dedicated the General Manager to plan and oversee all aspects of training. The General Manager will coordinate and schedule training, and ensure record-keeping compliance. Subject matter experts will deliver training related to the courses listed in the curriculum. In addition, the Company has retained Strategic Business Solutions to assist with administrative requirements related to the enrollment process, training data collection and data entry into the ETP online system.

## **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**

- Sales and Marketing
- Social Media Marketing
- Ticketing Processes

#### **COMMERCIAL SKILLS**

- Facilities Operation and Maintenance
- Game Day Staff Management
- Turf Maintenance

#### **COMPUTER SKILLS**

- Microsoft Office Suite (Intermediate/Advanced)
- SCORE CRM Software
- Ticket Return Software
- Website Development and Management

#### **CONTINUOUS IMPROVEMENT**

- Coaching and Mentoring Skills
- Leadership
- Teambuilding

### **CBT Hours**

0-8 Trainees may receive any of the following:

#### **MANUFACTURING SKILLS**

- Ticket Return Software Training – 4 Hours Total
  - Selling Tickets (1 hour)
  - Exchanging Tickets (1 hour)
  - Holding Tickets (1 hour)
  - Building Groupmatics Pages (1 hour)
- SCORE CRM Software Training – 4 Hours Total
  - Basic Functions (1 hour)
  - Building Contracts (1 hour)
  - Tracking Calls/Meetings (1 hour)
  - Syncing Schedules (1 hour)

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



**DELEGATION ORDER**

**Training Proposal for:**

**ICORE International, Inc. dba Zodiac Interconnect US**

**Agreement Number: ET19-0222**

**Approval Date:** August 24, 2018

**ETP Regional Office:** Sacramento

**Analyst:** J. Dongallo

**PROJECT PROFILE**

Contract Attributes:	Priority Rate Retrainee	Industry Sector(s):	Manufacturing Engineering  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Sonoma	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 150	U.S.: 150	Worldwide: 90,000
<u>Turnover Rate:</u>	2%		
<u>Managers/Supervisors:</u> (% of total trainees)	15%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$62,400		\$0	\$0		\$62,400

In-Kind Contribution:	100% of Total ETP Funding Required	\$92,000
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Cont. Improv., HazMat, Mfg. Skills, PL- Mfg. Skills	120	8-200	0	\$520	\$16.70
				Weighted Avg: 20			

**Minimum Wage by County:** Job Number 1: \$16.70 per hour for Sonoma County.  
**Health Benefits:**  Yes  No This is employer share of cost for healthcare premiums – medical, dental, vision.  
**Used to meet the Post-Retention Wage?:**  Yes  No  Maybe  
 Up to \$2.50 per hour may be used to meet the Post-Retention Wage requirement.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Administrative Staff		5
Manager/Supervisor Staff		15
Engineering Staff		25
Production Staff		60
Technical Support Staff		15

**INTRODUCTION**

Founded in 1960 and headquartered in Santa Rosa, ICORE International Inc. dba Zodiac Interconnect US (Zodiac Interconnect US) ([www.zodiacaerospace.com](http://www.zodiacaerospace.com)) is a wholly-owned subsidiary of SAFRAN S.A. The Company designs and manufactures electro-mechanical components, including electrical harnesses and harness protection gear for the Aerospace industry.

Zodiac Interconnect US develops high-technology systems that boost aircraft performance and enhance flight safety. Customers include Boeing, Airbus, Calco Aerospace, Honeywell, Lockheed Martin, and Taytheon. Training under this proposal will be conducted at the Santa Rosa facility. This is Zodiac Interconnect US’ second ETP contract and second within the last five years

**PROJECT DETAILS**

New technologies, systems and methodologies are continually being implemented in the aerospace industry. Specializing in the design and manufacturing of safety-critical and harsh environment electrical/wiring systems, Zodiac Interconnect US will train employees to meet the detailed requirements of commercial and military industries. Special product components are used in commercial and military aerospace platforms, and are imperative to operational safety of aerospace vehicles.

To provide innovative products and services to its customers, Zodiac Interconnect US' training will focus on enhancing workers communication, technical, 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.

In addition, training will introduce staff to new products, such as laser scanning technology, and upgrades to current production processes that will cater to customer specific requirements. Zodiac Interconnect US staff will also train on soft skills that will improve employees' overall business skills.

### **Training Plan**

Training will be delivered by in-house subject matter experts and training vendors acquired during the agreement. Training will be delivered via Class/Lab and Productive Lab (PL).

**Business Skills** – Training will be offered to all occupations. Training will enable staff to be more efficient and effective in their jobs. Training topics include Accounting Skills, Communication Skills, Marketing Strategies, Negotiation and Project Management.

**Computer Skills** – Training will be offered to all occupations. Trainees will receive training as it relates to their functions and systems used in their jobs. Training will allow the workforce to utilize the complex systems required by the Company to perform their jobs and increase their knowledge, skills, and abilities. Training topics include Computer Aided Design, Computerized Reports, Engineering Software Applications, MS Office (Intermediate and Advanced), Project Management Applications and Web-Based Computer Applications.

**Continuous Improvement Skills** – Training will be offered to all occupations. Training will insure the efficiency of the Company's operations to remain price competitive. Training topics include Standard Operating Procedures, Team Building, Zodiac Quality Systems, Lean Manufacturing and Inspection Procedures.

**Hazardous Materials** – Training will be offered to Engineering Staff, Production Staff and Manager/Supervisor Staff. Training will allow the workforce to operate in an appropriate manner when handling hazardous materials and conditions. Training topics include Flammable Control Procedures, Hazardous Safety Procedures, and Hazardous Materials Procedures.

**Manufacturing Skills** – Training will be offered to all occupations, however, the expected majority will be Engineering Staff and Production Staff. Training will provide workers with new and upgraded capabilities to build new products, meet the requirements of new customer contracts, and meet quality standards. Training topics include Assembly Procedures and Methods, Calibration, Electrical Harnesses, Electro-Mechanical Components, Manufacturing Techniques and Production Processes.

### **Productive Laboratory**

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

Zodiac Interconnect US will provide PL training to Engineering Staff and Production Staff. PL will enable employees to perform their duties efficiently while taking on additional duties of surrounding machines, as needed. This type of training has been proven to increase efficiencies by reducing downtime. Engineering Staff and Production Staff will also receive hands-on training that is specific to the operation and maintenance of new equipment. PL will supplement the Class/Lab training courses offered in the curriculum.



The instructor will be present at all times. Production is expected to be slowed during PL as the trainer will be stopping production to coach and mentor the trainee. Also, the equipment will be operating at a slower speed until proficiency is gained. The trainer will determine the trainee's level of competency at the end of the training. Zodiac Interconnect US is requesting a trainer-to-trainee ratio of 1:3 as this is how the Company provides training in small groups.

### **Commitment to Training**

Zodiac Interconnect US has an annual training budget of approximately \$125,000 for its Sonoma training facility. The Company utilizes in-house subject matter experts to conduct training. Moving forward, the Company intends to significantly increase the number of subject matter experts specializing in equipment upgrades to deliver more training. The training budget includes state-mandated safety training, equipment maintenance and installation, food safety and security, and sales training.

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

### **Training Infrastructure**

Zodiac Interconnect US has a detailed training plan in place and is ready to begin training upon Panel approval. The Human Resources (HR) Director will oversee all aspects of training. An additional HR specialist will be responsible for reports and internal data collection for tracking purposes. A team of high level subject matter experts will deliver training within the Company, with vendors to be determined later.

Additionally, the Company has retained the services of a third party administrator to oversee all administrative responsibilities.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **DEVELOPMENT SERVICES**

National Training Company, Inc. of Irvine assisted with development for a flat fee of \$2,000.

### **ADMINISTRATIVE SERVICES**

National Training Company, Inc. will also perform administrative services for a fee not to exceed 13% of payment earned.

### **TRAINING VENDORS**

To Be Determined

**PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
18CS-0093	Sonoma	09/27/2017 – 09/26/2019	\$25,200	\$0.00 (0%)

The Company was unable to execute training due to the Training Coordinator’s unexpected departure from the Company. Due to poor administration and company support for the project, the Company terminated their first ETP contract with no record of training delivered to staff.

To ensure this contract is successful, the HR Director and an HR Specialist will oversee and coordinate this training project. In addition, a third party administrator, will assist with project administration. Zodiac Interconnect US has a detailed training plan in place.

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

8-200 Trainees may receive any of the following:

**BUSINESS SKILLS**

- Accounting Skills
- Business Processes
- Communication Skills
- Customer Service and Sales Skills
- Leading Teams
- Manage in a Difficult Environment
- Marketing Strategies
- Negotiation
- Performance Management Skills
- Product and Service Knowledge
- Project Management

**COMPUTER SKILLS**

- Computer Aided Design
- Computerized Reports
- Database Administrator/Developer Tools
- Engineering Software Applications
- MS Office (Intermediate and Advanced)
- Production/Distribution/Planning Software
- Project Management Applications
- Software Development
- Web-Based Computer Applications

**CONTINUOUS IMPROVEMENT**

- APICS – Production and Inventory Control
- AS9100
- Inspection Procedures
- ISO14001
- Leadership Skills
- Lean Manufacturing
- Quality Control
- Standard Operating Procedures
- Team Building
- Team Problem Solving
- Zodiac Quality Systems

**HAZARDOUS MATERIALS**

- Emergency Response Team Training
- Flammable Control Procedures
- Hazardous Materials Handling
- Hazardous Safety Procedures
- Hazardous Waste

**MANUFACTURING SKILLS**

- Assembly Procedures and Methods
- Calibration
- Design Standards and Processes
- DITMCO Training
- Electric Harnesses
- Electro-Mechanical Components
- Engineering & Design Procedures
- Forklift Procedures
- Harness Protection
- Injection Molding
- Manufacturing Techniques
- Material Handling
- Production Equipment/Tools
- Production Processes
- Resolving Production Problems
- Standard Operating Procedures
- Technical Specifications
- Testing Equipment
- Welding

**Productive Lab Hours**

0-60 Trainees may receive any of the following:

**MANUFACTURING SKILLS (1:3 ratio)**

- Calibration Equipment
- Computer Aided Design
- Injection Molding Equipment
- Production Assembly and Repair
- Testing Equipment
- Welding Equipment

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

**Training Proposal for:  
 Multi Cable, Inc.**

**Small Business**

**ET19-0229**

**Approval Date:** August 28, 2018

**ETP Regional Office:** North Hollywood     **Analyst:** J. Romero

**CONTRACTOR**

- Type of Industry:
  - Communication
  - Construction
  - Priority Industry:  Yes    No
  
- Number of Full-Time Employees
  - California: 33
  - Worldwide: 50
  - Number to be trained: 33
  - Owner  Yes    No
  
- Out-of-State Competition:     NAICS Code Eligible
- Special Employment Training (SET):      Yes    No
- High Unemployment Area (HUA):      Yes    No
- Turnover Rate:     15%
- Repeat Contractor:      Yes    No

**FUNDING**

- Requested Amount:     \$34,320
- In-Kind Contribution:     \$49,500

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate SB <100	Business Skills; Computer Skills; Commercial Skills;	33	8-60	0	\$1,040	\$17.54
				Weighted Avg: 40			

- Reimbursement Rate: Job #1: \$26 Small Business Rate
- County(ies): Los Angeles County
- Occupations to be Trained: Mechanic, Technician, Foreman, Administration, IT, Driver, Designer, Supervisor/Manager, Owner
- Union Representation:  Yes  
 No
- Health Benefits: Job #1: \$2.50 per hour

**SUBCONTRACTORS**

- Development Services: Multi Cable retained Judith's Training Services (JTS) in Los Angeles to assist with development of this proposal for a flat fee of \$3,723.
- Administrative Services: JTS will also perform administrative services in connection with this proposal for a fee not to exceed 10% of payment earned.
- Training Vendors: To Be Determined

**OVERVIEW**

Founded in 1982 and located in Sylmar, Multi Cable, Inc. (Multi Cable) ([www.multicabletv.com](http://www.multicabletv.com)) is a technical installation company that provides installation services, Multiple Dwelling Wiring (MDU) upgrades and rewires, underground construction and custom wiring related to the internet, television, and telephone to residential and commercial establishments. The Company has wired over 200,000 apartments and condominium in the past 34 years. Clients include Time Warner, Cox, AT&T and Comcast.

In 2017, Multi Cable underwent a major reorganization due to legal matters resulting in most of its cable installing department being absorbed by Time Warner Cable. Multi Cable is now a small business and has directed its business concentration towards providing full service aerial and underground communication construction contracts with AT&T and other cable companies. The Company recently invested in new equipment which includes a Fiber Optic Fusion, Ditch Witch, Directional Board, Bobcat machine, a mini-excavator and cranes needed in providing this service to its customers. In view of the changes in the Company's business, Multi Cable has

initiated operational restructuring to align the Company's processes to this new business direction necessitating the Company to train employees on new equipment, technologies and processes in order to provide its workforce with upgraded skillset in performing multiple job functions. Training in this proposal will include specific job skills training and cross-training on Multi Cable processes and on various equipment which will enable employees to respond to multiple job functions.

## Training Plan

This Multi Cable's second ETP Agreement, its second in the last five years. Training in this ETP proposal is a progression of the training provided in the prior ETP Agreement combined with new skills training on Commercial Skills, Computer Skills and Business Skills. The Company will train its employees on new processes and new equipment essential in the job requirement of the new business direction the Company has taken and equip their employees with new skills and enable them to perform multiple job functions.

**Business Skills:** This training will be offered to Administration, Designer, IT, Supervisor/Manager and Owner. This training will provide staff with skills to reduce cycle time, increase work output and higher customer satisfaction.

**Commercial Skills:** This training will be offered to Mechanic, Technician, Foreman and Driver. Training includes A-Class driver training, equipment/machine operation, telecommunications, aerial/underground cable placement, pole climbing and tool usage. Trainees will learn to operate vehicles and equipment used in the technical installation process. Training will help reduce errors and reduce operating cost.

**Computer Skills:** This training will be offered to IT, Administration, Designer, Technician and Supervisor/Manager. Trainees will acquire skills in using and navigating the new software and receive training on the latest upgrades in Local Area Networks (LAN) and the World Wide Web.

### ➤ Training Infrastructure

Multi Cable is ready to start training upon approval. Training will be provided at the Multi Cable facility in Sylmar by a combination of in-house staff and outside training vendors. The owner, one administrative staff, and a staff from the accounting department will oversee and administer the Agreement. Multi Cable has retained the services of Judith Training Services for administration of the ETP project. The Owner will be the key person in charge of the project.

## RECOMMENDATION

Staff recommends approval of this proposal.

## PRIOR PROJECTS

The following table summarizes performance by Multi Cable Inc. under an ETP Agreement that was completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET17-0107	Los Angeles	07/01/16- 06/30/18	\$111,820	\$79,382 (71%)

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

8-60

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Accounting and Payroll Systems
- Sales and Marketing Techniques
- Project Management
- Product Management
- Communication Skills
- Resolving Complaints
- Decision Making
- Inventory Control

**COMPUTER SKILLS**

- Local Area Networks (LAN)
- Quickbooks
- World Wide Web (WWW)

**COMMERCIAL SKILLS**

- A-CLASS Drivers Training (Professional Truck Driver Training Course)
- Directional Board (Project Mapping/Planning)
- Equipment/Machine Operation Training
  - Ditch Witch Machine
  - Fiber Optic Fusion Machine
  - Bob Cat
  - Craine
  - Mini-Excavators
  - Griner
- Telecommunications
- Cable Placement (aerial/underground)
- Pole Climbing
- Tool Usage

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

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

**Nu Flow America, Inc. dba Specialized Pipe Technologies**

**Delegation  $\leq$  \$75,000 Single Employer**

**ET19-0246**

**Approval Date:** September 13, 2018

**ETP Regional Office:** San Diego

**Analyst:** K. Hernandez

**CONTRACTOR** www.sptpipe.com

- Type of Industry: Construction (C)  
Construction (23)
  
  - Number of Full-Time Employees  
California: 83  
Worldwide: 96  
Number to be trained: 70
  
  - Out-of-State Competition:
  - Special Employment Training (SET):
  - High Unemployment Area (HUA):
  - Turnover Rate:
  - Repeat Contractor:
- Priority Industry:  Yes  No
- Small Business**
- Small Business Only:  
Owner  Yes  No
- Yes  No
- Yes  No
- 16%
- Yes  NO

**FUNDING**

- Requested Amount: \$72,800
- In-Kind Contribution: \$130,636

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	ETP Required Wage
				Class / Lab	CBT		
1	Priorirty Initiative Retrain	Business Skills Commercial Skills Computer Skills Continuous Impr OSHA 10/30	70	8-200	0-100	\$1,040	\$17.03
				Weighted Avg: 40			

- Reimbursement Rate: \$26 Priority/ Program Initiatives
- County(ies): San Diego, Orange, and San Mateo
- Occupations to be Trained: Technicians, Administration Staff, Sales Staff, Supervisors/Managers
- Union Representation for Trainees:  Yes  No
- Health Benefits: (Employer Paid to Meet ETP Wage)  No  Yes  
Up to \$2.00 per hour may be included to meet ETP Required Wage for Job# 1.
- Turnover Rate Justification for Waiver N/A

**OVERVIEW**

<b>Year Company Founded:</b>	1998	<b>Company Headquarters:</b> <input type="checkbox"/> Single location San Diego, CA
<b>Facility Locations Outside CA</b>	Florida, Maryland, Nevada, and Ohio	
<b>Total Number of Facility locations in California</b>	3	
<b>Facility location(s) where training will occur</b>	San Diego, Tustin, and San Bruno	

<b>Nature of Business:</b>	Nu Flow America, Inc. dba Specialized Pipe Technologies (SPT) specializes in the manufacturing and installation of patented and proprietary trenchless, no-dig drain and sewer lining technologies, such as solvent cyclonic cleaning and pipe bursting solutions.
<b>Customer Base:</b>	SPT provides services to national retailers, commercial buildings, the U.S. Department of Defense, hospitality properties, and healthcare facilities.

<b>Business / Industry Needs / Changes:</b>	<p>Two significant changes supporting SPT's need for ETP training funds are company growth/acquisitions and customer demand.</p> <p>SPT grew 18% in 2017. This growth was due to the acquisitions of two companies in 2016, exponentially increasing customer demand. The Company is anticipating additional growth in 2018-19, creating significant challenges regarding quality and product/service delivery.</p>
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**Training Plan:**

<b>Need for Training:</b>	<p>This training project will be primarily for Technicians in Commercial Skills such as Specialized Relining Technology Skills to increase work quality and efficiency. Technicians will also be trained on Computer Skills as functions in the field are being transitioned from manual to digital reporting processes. This will require training in the use of electronic tablets and the companies Field Service Platform software.</p> <p>Sales Staff will be trained in Business Skills to improve Sales/Recruiting Skills. The Sales Staff will also be trained in the basics of the Company's technology so they can offer better support to the field and communicate more effectively with the customer. All occupations will receive Computer Skills in the newly implemented Customer Relationship Management system.</p>
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Training courses listed in the Menu Curriculum will be provided via the following training method(s) under the following Types of Training:

- Class/lab     
  E-Learning     
  CBT     
  Productive Lab

Business Skills	Commercial Skills	Computer Skills
Continuous Improvement		

<b>Certified Safety Training</b>	<input checked="" type="checkbox"/> OSHA 10/30 <input type="checkbox"/> HAZWOPER <input type="checkbox"/> Hazardous Materials (HAZMAT)
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<b>Training Infrastructure &amp; Administrative Plan</b>	<ul style="list-style-type: none"> <li>• <b>Coordination of Training (Oversight):</b> The Company's Vice President of Operations will oversee overall administration with assistance from the Operations Manager. Managers/Supervisors at each location will facilitate training at their locations.</li> </ul>
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	<ul style="list-style-type: none"> <li>• <b>Trainers:</b> SPT will be delivering training using both in-house subject-matter experts and vendors, if necessary. Training is ongoing; however, ETP-funded training will start at contract approval.</li> <li>• <b>Administrative Duties:</b> SPT will contract with an administrative subcontractor to assist with project administration. SPT’s Vice President of Operations and support staff will work together to provide the necessary documents to their administrative subcontractor for uploading in the ETP online systems.</li> </ul>
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**RECOMMENDATION**

Staff recommends approval of this proposal and modifications

**SUBCONTRACTORS**

<b>Subcontractor Type</b>	<b>Subcontractor Name</b>	<b>City</b>	<b>Cost / %</b>
• Development	Bright Training Solutions	Menifee, CA	\$3,000
• Administrative	Bright Training Solutions	Menifee, CA	Not to exceed 10%
• Training Vendors	To Be Determined	N/A	N/A

**Exhibit B: Menu Curriculum**

**Class/Lab Hours**

8-200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Leadership Skills for Non Managers
- Leadership Skills for Managers
- Time Management Skills
- Business Writing Skills
- Project Planning and Management Skills
- Estimating Skills
- Budgeting Skills
- Basic Finance and Accounting Skills
- Job Reporting Skills
- Sales & Recruiting Skills
- Customer Service Skills
- Communication Skills
- Managing by Metrics Skills
- Train-The-Trainer

**COMMERCIAL SKILLS**

- Plumbing Systems
- Drafting
- Specialized Relining Technology
- Job Site Awareness

**COMPUTER SKILLS**

- Client Communication Hardware/Software
- Enterprise Resource Planning
- Customer Relationship Management System
- Microsoft Office
- Field Service Platform Software

**CONTINUOUS SKILLS**

- Process Improvement Skills
- Knowledge Transfer/Succession Planning Skills
- Team Building Skills

**CERTIFIED SAFETY TRAINING** (OSHA-Certified Trainer)

- OSHA 10
- OSHA 30

**E-Learning**

0-200

**BUSINESS SKILLS**

- Leadership Skills for Non Managers
- Leadership Skills for Managers
- Time Management Skills
- Business Writing Skills
- Project Planning and Management Skills
- Estimating Skills
- Budgeting Skills
- Basic Finance and Accounting Skills
- Job Reporting Skills
- Sales & Recruiting Skills
- Customer Service Skills
- Communication Skills
- Managing by Metrics Skills
- Train-The-Trainer

**COMMERCIAL SKILLS**

- Plumbing Systems
- Drafting
- Specialized Relining Technology
- Job Site Awareness

**COMPUTER SKILLS**

- Client Communication Hardware/Software
- Enterprise Resource Planning
- Customer Relationship Management System
- Microsoft Office
- Field Service Platform Software

**CONTINUOUS SKILLS**

- Process Improvement Skills
- Knowledge Transfer/Succession Planning Skills
- Team Building Skills

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



**DELEGATION ORDER**

**Training Proposal for:  
PGP International, Inc.**

**Agreement Number: ET19-0234**

**Approval Date:** August 24, 2018

**ETP Regional Office:** Sacramento

**Analyst:** D. Jordan

**PROJECT PROFILE**

Contract Attributes:	Priority Rate Retrainee HUA	Industry Sector(s):	Manufacturing  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Yolo	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: 180	U.S.: 225	Worldwide: 140,000
<u>Turnover Rate:</u>	1%		
<u>Managers/Supervisors:</u> (% of total trainees)	7%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$69,680		\$0	\$0		\$69,680

In-Kind Contribution:	100% of Total ETP Funding Required	\$69,725
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate HUA	Business Skills, Computer Skills, Mgmt. Skills	134	8-200	0	\$520	*\$12.53
				Weighted Avg: 20			

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

**Minimum Wage by County:** Job Number 1 (HUA): \$12.53 per hour in Yolo 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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Accounting Staff		5
Administrative Staff		20
Leads		5
Operators		31
Production Staff		55
Managers/Supervisors		18

**INTRODUCTION**

PGP International, Inc. (PGP) ([www.pgpint.com](http://www.pgpint.com)) is an ABF Ingredients Company, a division of Associated British Food PLC that was founded in 1983. PGP is a leading manufacturer and supplier of cereal food ingredients such as extruded particulates, rice flours and blends, and functional grain-based ingredients. The Company is headquartered in Woodland with rice milling and food extrusion facilities located in Colusa and Evansville, IN. Training under this proposal will take place at PGP's location in Woodland.

**Need For Training**

This is PGP's fifth ETP Agreement, the third in the last five years. Previous training focused on product customization. Each order has specific requirements and are not produced until the order is received, thus making product configuration complex. In this proposal, PGP will focus on



increasing efficiencies, meeting customer needs and improving leadership skills. Although some training curriculum is similar to the previous Agreement, trainees will not receive duplicate training.

PGP promotes employees from within the Company and will provide management and leadership skills which are critical for new Leads and Managers/Supervisors that have no formal training. Training will allow staff to develop skills in Performance Management, Decision Making, Supervisory Skills and conducting effective meetings. Managers/Supervisors will also receive training on Talent on a Page. Training will help facilitate retention of management level trainees.

Additionally, PGP has implemented a new ERP/MRP Inventory Management system to streamline operations and reduce cycle time. The Company currently runs three shifts five days a week and the new system will assist in increasing efficiency. With increasing efficiency PGP will also be able to increase sales. The ERP system will also assist with controlling costs, meeting customer commitments and allow PGP to stay competitive.

## **PROJECT DETAILS**

### **Training Plan**

Training will be delivered via Class/Lab in the following:

**Business Skills:** Training will be delivered to all occupations and focus on Customer Service and Strategic Planning. Training will allow staff to increase efficiencies, meet customer's needs and increase sales.

**Computer Skills:** Training will be delivered to all occupations and focus on its new ERP/MRP Inventory Management system. Training will streamline operations and reduce waste time. Training will also be delivered in Microsoft Dynamics and Computer/Internet Applications in Business.

**Management Skills:** Training will be delivered to Leads and Managers/Supervisors and focus on Project Management, Communication Skills, Management Styles and Strategic Planning.

### **High Unemployment Area**

All trainees work in a High Unemployment Area (HUA) exceeding the state average by at least 25%. The Company's location in Yolo County qualifies for HUA status under these standards. PGP requests a wage modification from \$16.70 to \$12.53 per hour.

### **Commitment to Training**

PGP allocates approximately \$50,000 annually for training in new-hire orientation, staff development and safety training. ETP funds will not displace the existing financial commitment to training. Safety training is provided in accordance with all pertinent requirements under state and federal law.

#### ➤ Training Infrastructure

PGP has a detailed training plan in place and is ready to begin training upon approval. The HR Manager will oversee all project training and administration. In addition, the Company has retained Manex Consulting to assist with administration. Training will be delivered by in-house experts, and vendors as needed.

## **RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
*ET17-0234	Woodland	10/01/16 – 09/30/18	\$133,056	\$0 (0%)
ET12-0168	Woodland	11/21/11 – 11/20/13	\$131,672	\$126,596 (96%)

\*Due to changes in PGP's upper Management, loss of the CEO, HR Manager and Site Manager, the Contractor was unable to train efficiently and chose to terminate its ETP Contract. The Company has now stabilized its upper Management and a new CEO, HR Manager and Site Manager are in place. The Company also has brought on Manex Consulting to assist with the administration and development of the Agreement.

**DEVELOPMENT SERVICES**

Manex Consulting of San Ramon assisted with development for a flat fee of \$4,824.

**ADMINISTRATIVE SERVICES**

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

**TRAINING VENDORS**

To Be Determined

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

8 - 200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Customer Service
- Strategic Planning
- Talent on a Page

**COMPUTER SKILLS**

- Computer/Internet Applications in Business
- ERP/MRP Inventory Management
- Microsoft Dynamics

**MANAGEMENT SKILLS (Managers/Supervisors Only)**

- Communication Skills
- Decision Making/Problem Solving
- Developing Teams
- Development Dimension Leadership Training
- Effective Meetings
- Effective Writing
- Facilitation Skills
- Finance for Small/Medium Sized Manufacturers
- Introduction to Supervision
- Leadership/ Management Development
- Listening Skills
- Management Skills
- Management Styles
- Managing Change
- Managing Customer Service (Internal & External)
- Managing Innovation
- Project Management
- Strategic Planning
- Supervisory Skills
- Talent on a Page

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



**TRAINING PROPOSAL FOR  
R.S.S.E., Inc.  
18-0648**

**Approval Date:** August 21, 2018  
**Regional Office:** Sacramento Regional Office  
**Analyst Name:** Dumaurier Jordan  
**Type of Proposal:** Single Employer (SB), Small Business Program  
**Funding Source:** SET

**FUNDING OVERVIEW**

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

<b>TOTAL ETP FUNDING:</b>		<b>\$5,148.00</b>	
<b>Program &amp; Admin Cost</b>	<b>Support Cost (\$)</b>	<b>Substantial Contribution (\$)</b>	<b>Total In-Kind</b>
\$ 5,148.00	N/A	\$ 0.00	\$ 10,000.00

**APPLICANT PROFILE**

<b>Company Summary</b>	R.S.S.E., Inc. (RSSE) is a service contractor that installs fuel dispensing systems and point of sale systems in service stations, convenience stores and truck stops.
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<b>Industry Sector(s)</b>	Construction		
<b>Priority Industry</b>	Yes		
<b>No. Employees (Applicant)</b>	<b>State: 12</b>	<b>US: 12</b>	<b>World Wide: 12</b>
<b>Turnover Rate (Applicant)</b>	10.00 %		
<b>Repeat Contractor</b>	Yes		
<b>High Unemployment Area</b>	Yes		
<b>Union(s)</b>	N/A		

## **TRAINING PROFILE**

### **Training Objective(s)**

Training will focus on ensuring staff has a full understanding of new computer software and industry standards.

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

<b>#</b>	<b>Group Characteristics</b>	<b># Of Trainees</b>	<b>Reimbursement Rate</b>	<b>Weighted Avg. Hours</b>	<b>Cost Per Trainee</b>	<b>Min-Max Hours</b>
1	Owner, Retrainee	2	\$ 26.00	14	\$ 364	8 - 60
1	Retrainee	10	\$ 26.00	14	\$ 364	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	2	\$ 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 2010 and headquartered in Redding, RSSE has been supplying equipment to engineering and construction companies located in Northern California for over 50 years. RSSE's services include sales, installation, and repair of fuel dispensing systems; Point of Sale systems; air compressors; lubricating equipment; and hydraulic vehicle lifts. The Company also provides compliance testing for all fuel dispensing operations. RSSE's customer base includes service stations, convenience stores, truck stops, airports, municipalities, auto repair shops, and other commercial entities.

All training will take place at RSSE's location in Redding.

## 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 RSSE's second ETP Agreement, the second in the last five years. Training under this ETP Agreement will continue to focus on ensuring staff is up to date with industry standards on new technology including the Radio Frequency Identification (RFID) chip. RFID chips in credit and debit cards require upgrades to point of sale systems from the fuel pumps to the cash register. Training is required for installation, troubleshooting, and repair of various fuel dispensing systems. All RSSE clients must have the new RFID technology installed by December 2018. There will be no duplication of training for trainees who participated in the prior contract.

Additionally, training will focus on new releases of upgraded vapor recovery pumps dispensers and hoses. The update to the fuel dispensing systems are centered on more environmentally sound features for issues like vapor recovery and spills. Training will bring staff skills up to industry standards and is needed to ensure that the quality of work is not compromised.

RSSE training will also consist of computer software updates to Vision Software and Davis Ware S2K. Training is required to give employees the tools necessary to navigate the system and improve processes.

## PROPOSED TRAINING PROJECT DETAILS

<b>Training Infrastructure and Administrative Plan</b>	RSSE has a detailed training plan in place and is ready to begin training upon approval. RSSE has designated the Owner to plan, schedule and ensure all aspects of training are in compliance with ETP guidelines. In addition, RSSE has retained the services of a third-party administrative subcontractor to assist with administrative requirements. Training will be delivered by in-house experts.
<b>Marketing Plan (MEC Only)</b>	N/A
<b>Support Cost Description (MEC Only)</b>	N/A
<b>Substantial Contribution Description</b>	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
<b>Summary</b>	
All occupations (Attachment 1) will receive training in Business, Commercial, Computer, Continuous Improvement and Hazardous Materials (Attachment 2).	

### 4. Additional Company or Training Project Details

#### Retrainee – Job Creation

New industry standards have called for RSSE to implement the new RFID technology. With the new industry standards, software and equipment upgrades, the Company must hire additional Service Technicians.

The Company has committed to hiring two new employees (Group 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into “net new jobs” as a condition of contract.

#### 4.1 Program Waivers

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

Waivers	Description
<b>High Unemployment Area</b>	All trainees work in a High Unemployment Area (HUA) exceeding the state average by at least 25%. The Company’s location in Shasta County qualifies for HUA status under these standards. RSSE is requesting a wage modification to \$12.53 per hour (9% below the Standard Minimum Wage) to train 10 trainees in Group Number 1. Group Number 2 (Job Creation) will not need a modification as they qualify for the New Hire Standard Minimum Wage.

## 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	Strategic Business Solutions, LLC	Visalia	\$618
Administrative	Strategic Business Solutions, LLC	Visalia	Not to exceed 13% of funding earned.
Training	None selected to date	N/A	N/A

### 4.3 Previous ETP Project Summary

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

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
ET16-0138	Redding	08/04/15 – 08/03/17	\$12,760	\$4,983	40%
<b>Notes</b>	A large portion of planned training was on RFID technology. Due to Federal Government extensions in deadline for installation of RFID technology, the Company felt this training was premature and halted this portion of the overall training plan. Through they trained on other topics, their performance was impacted by not providing RFID training as planned. The current proposal has been “right-sized” consistent with prior earning and training hours have been reduced to ensure success.				

### 4.4 Supporting Panel Proposal Documentation

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



## Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
<b>Training Type (Level)</b>	<b>Planned Course Offerings</b>
Business Skills	Account Development
	Effective Communications
	Job Estimating Skills
	Project Management
	Time management
Commercial Skills (Standard)	Fuel Dispensing Systems Installation and Repair
	Materials Handling Equipment training
	Point of Sale Systems Installation and Repair
Computer Skills (Standard)	Davis Ware S2K Vision Software training
	Europay, Mastercard and Visa Software training
	Microsoft Applications
	Quickbooks Software training
Continuous Improvement Skills	LEAN Processes
	Quality Control
Hazardous Materials Skills	Hazardous Materials Spill Clean Up Protocols



**Training Proposal for:  
Scientific Drilling International, Inc.**

**Agreement Number: ET19-0228**

**Approval Date:** September 14, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** M. Reeves

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate HUA	Industry Sector(s):	Services Manufacturing  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Kern	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 389	U.S.: 1,144	Worldwide: 1,700
<u>Turnover Rate:</u>	10%		
<u>Managers/Supervisors:</u> (% of total trainees)	8%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$55,770		\$0	\$0		\$55,770

In-Kind Contribution:	100% of Total ETP Funding Required	\$56,511
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate HUA	Business Skills, Commercial Skills, Computer Skills, Continuous Imp.	39	8-200	0-7	\$1,430	*\$12.53
				Weighted Avg: 55			

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

<p><b>Minimum Wage by County:</b> \$12.53 per hour for Kern County (HUA).</p> <p><b>Health Benefits:</b> <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No This is employer share of cost for healthcare premiums – medical, dental, vision.</p> <p><b>Used to meet the Post-Retention Wage?:</b> <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Maybe Up to \$1.53 per hour may be used to meet the Post-Retention Wage.</p>
---

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Motor Technician		2
Motor Shop Supervisor		1
District Manager		1
Well Planner		2
Technician		1
Office Manager		1
Survey Coordinator		1
Survey Operator		4
Alliance Coordinator		1
Administrative Assistant		1
HSE Coordinator		1
MWD Coordinator		1
DD Coordinator		1
Logistics Coordinator		1
Wireline Operator		2
MWD Operator		7
Directional Driller (DD)		11

## **INTRODUCTION**

Founded in 1969, Scientific Drilling International (SDI) ([www.scientificdrilling.com](http://www.scientificdrilling.com)) has a long history of designing, engineering, and manufacturing directional drilling technology for the oil, gas, geothermal, and mining industries. Located in Shafter, SDI's products include borehole surveying instruments (both gyroscopic and magnetic), MWD (measurement while drilling)/LWD (logging while drilling) systems, rotary steerable technologies, drill motor designs, and production logging systems. SDI's tools and sensors are designed for outstanding performance under severe drilling conditions such as extreme temperature, pressure, well depth, dogleg severity, drilling shock and vibrations.

## **PROJECT DETAILS**

With technology changing rapidly, and both conventional and unconventional drilling becoming more difficult, SDI must adapt and find innovative solutions that optimize performance. SDI's expertise is dependent upon its employees having the knowledge and skills needed to provide the products and services customers demand.

The proposed training is customer-driven and designed to equip employees with the ability to keep pace with current technology trends in drilling and surveying platforms, as well as implement process improvements to maximize efficiency. Key areas of training will include drilling technology, survey tools, calculation methods, navigation techniques, logging technologies, problem solving, project management, and leadership skills.

Training will take place at SDI's facility in Shafter. Course instruction will be delivered by a combination of in-house subject matter experts and vendors.

### **Training Plan**

Training will be delivered via Class/Lab and Computer-Based Training (CBT) as outlined below:

**Business Skills:** Training will be provided to all occupations. Training will provide workers with the skills to communicate effectively with customers and team members, analyze business needs and solutions, assess customer expectations, and identify opportunities to increase business capacity.

**Commercial Skills:** Training will be provided to Technicians, Operators, Coordinators, Well Planners, Survey Staff, and Drilling Staff. Training will focus on industry-specific skills to help workers become more proficient in the use of tools and technology associated with the oil, gas, geothermal, and mining industries.

**Computer Skills:** Training will be provided to all occupations. Training will help workers become more proficient with business software solutions in the areas of resource planning, inventory control, project management, and logistics. Select staff will also receive Microsoft Office training to enhance operational communication and productivity.

**Continuous Improvement:** Training will be provided to all occupations. This training is intended to improve efficiencies throughout the organization, with emphasis on lean concepts, teambuilding, and problem solving. Quality concepts training will provide workers with the technical skills to meet customer demand and industry specifications.

## **Commitment to Training**

SDI spends approximately \$25,000 annually on training at its California facility. Company-funded training includes new-hire onboarding/orientation, regulatory topics, and OSHA training. Safety training is provided in accordance with all pertinent requirements under state and federal law.

### ➤ Training Infrastructure

SDI's Human Resources Manager will oversee project administration and training. Additional department head personnel will be assigned to assist with training enrollment, scheduling, delivery, and documentation. SDI has also retained an outside administrative consultant to ensure that all training adheres to ETP requirements.

## **High Unemployment Area**

The trainees in Job Numbers 1 work in a High Unemployment Area (HUA), with unemployment exceeding the state average by 25%. The Shafter location qualifies for HUA status under these standards. Therefore, SDI is requesting an HUA wage modification.

## **RECOMMENDATION**

Staff recommends approval of this proposal.

## **DEVELOPMENT SERVICES**

Training Grants Intelligence, Inc. (TGII) in Canton, GA assisted with development of this proposal at no charge.

## **ADMINISTRATIVE SERVICES**

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

## **TRAINING VENDORS**

Marcove Training in Paso Robles will provide Leadership Skills training. Other trainers will be identified for ETP record-keeping purposes, as they are retained.

**Exhibit B: Menu Curriculum****Class/Lab Hours**  
8-200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- ‡Leadership Skills
- ‡Business Analysis
- ‡Office Management Skills
- ‡Sales and Marketing
- ‡Business Communications

**COMMERCIAL SKILLS**

- ‡Titan Series Drilling Motors
- ‡Electromagnetic Measurement While Drilling (EM-MWD)
- ‡HPHT Cased Hole Logging Technologies
- ‡River Crossing Navigation
- ‡Industrial Utility Drilling
- ‡Construction Drilling and Surveying
- ‡North Seeking Systems
- ‡Real-time Gyro Navigation
- ‡Locate Existing Underground Utilities
- ‡Survey Tool Selection
- ‡Survey Tool Operation
- ‡Calculation Methods
- ‡Geothermal
- ‡Motor Shop

**COMPUTER SKILLS**

- ‡Project Management
- ‡MS Office: Word, Excel, Access, PowerPoint (Intermediate and Advanced)
- ‡Business Software
- ‡Systems, Applications and Products
- ‡SAP

**CONTINUOUS IMPROVEMENT**

- ‡Operational Excellence & Reliability
- ‡Risk Mitigation and Public Safety Across Civil Engineering Projects
- ‡Leadership Skills for Frontline Workers
- ‡Quality Concepts
- ‡Process Improvement
- ‡Teambuilding
- ‡Problem Solving
- ‡Focus Improvement
- ‡Organizational Capability Continuous Improvement
- ‡High Performance Work Teams
- ‡Wow Consumers
- ‡Productivity
- ‡Winning Together
- ‡Business Performance/Skills Enhancement
- ‡Communication Skills
- ‡Project Management

- ✚Lean
- ✚Systems, Applications and Products
- ✚Best Practices

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

**CBT Hours**

0 – 7

**CBT - BUSINESS SKILLS**

- ✚Conflict Resolution (1 hour)
- ✚Business Ethics (1 hour)
- ✚Organizational Skills (1 hour)
- ✚Business Writing & Business Etiquette (1 hour)

**CBT – COMPUTER SKILLS**

- ✚Microsoft SharePoint Design (3 hours)

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



**Training Proposal for:  
Security On-Demand, Inc.**

**Delegation ≤ \$75,000 Single Employer**

**ET19-0208**

**Approval Date:** August 14, 2018

**ETP Regional Office:** San Diego

**Analyst:** M. Ibarra

**CONTRACTOR**    [www.securityondemand.com](http://www.securityondemand.com)

- Type of Industry: Services (G)  
Information / Multi Media (51)  
Priority Industry:  Yes  No
- Number of Full-Time Employees  **Small Business**
  - California: 60
  - Worldwide: 64
  - Number to be trained: 70
- Out-of-State Competition:  Yes  NO
- Special Employment Training (SET):  Yes  NO
- High Unemployment Area (HUA):  Yes  NO
- Turnover Rate: 13%
- Repeat Contractor:  Yes  NO

**FUNDING**

- Requested Amount: \$74,880
- In-Kind Contribution: \$107,186



**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	ETP Required Wage*
				Class / Lab	CBT		
1	Priority Initiative Retraining	Business Skills Computer Skills Commercial Skills Continuous Impr PL-Computer Skills	60	8-200	0	\$1,040	\$17.03
				Weighted Avg: 40			
2	Priority Initiative Retraining Retrainee – Job Creation	Business Skills Computer Skills Commercial Skills Continuous Impr PL-Computer Skills	10	8-200	0	\$1,248	*\$14.19
				Weighted Avg: 48			

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

- Reimbursement Rate: \$26 Priority
- County(ies): San Diego
- Occupations to be Trained: Administrative Support Staff, Engineer, Security Operations Analyst, Developer, Project Coordinator & Technical Accounts, Sales Staff, Supervisor/Manager, and Owner
- Union Representation for Trainees:  Yes  No
- Health Benefits: (Employer Paid to Meet ETP Wage)  Yes  No

**OVERVIEW**

<b>Year Company Founded:</b>	2001	<b>Company Headquarters:</b> <input checked="" type="checkbox"/> Single location San Diego, CA
<b>Facility location(s) where training will occur</b>		San Diego (San Diego County)

<b>Nature of Business</b>	Security On-Demand, Inc. (Security On-Demand) is a managed cyber security company that provides advanced cyber threat detection and analytics services using a proprietary platform.
<b>Customer Base</b>	Retail, Banking, Healthcare, Manufacturing, E-Commerce, Biotechnology, State, and Local Government.

<b>Business / Industry Needs / Changes</b>	Cyber-security is a fast-growing and expanding industry, growing at an annual compound growth rate between 18% and 20%. However, Security On-Demand has been consistently growing at a rate of over 35% in the last three years, expanding its office space and adding new employees. The Company expects continued growth the next two years. Specifically, the Company expects an increase in the number of installations (due to the addition of a new managed service); staff, and sales revenue. This growth will also require the addition of additional office space.
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**Training Plan:**

<b>Need for Training</b>	<p>To support increasing customer demands and growth, Security On-Demand must keep pace with technological advances in the industry. The Company must continually improve business and processes, providing threat detection capabilities, investigating cyber intrusions, and responding to cyber incidents.</p> <p>The Company will hire and train 10 new employees. Security On-Demand has developed a comprehensive training program to provide its newly-hired employees the skills to be successful in their job functions as well as become educated and productive in the cyber security business environment.</p>
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Training courses listed in the Menu Curriculum will be provided via the following training method(s) under the following Types of Training:

- Class/lab     
  E-Learning     
  CBT     
  Productive Lab

Business Skills	Commercial Skills	Computer Skills
<b>Continuous Improvement</b>		

The PL instructor must be dedicated to training, at a ratio of 1:1 for a maximum of 40 hours.

<b>Productive Laboratory</b>	<p><b>Justification:</b></p> <p><input type="checkbox"/> New Equipment</p> <p><input checked="" type="checkbox"/> New Production Procedures</p> <p><input checked="" type="checkbox"/> Certification Standards</p>
	<p><b>24 PL Hours per-trainee</b></p> <p><b>Occupations Receiving PL Training:</b>                  Engineer, Security Operations Analyst, and Project Coordinator &amp; Technical Accounts</p>
<b>Job Creation Justification</b>	<p><input checked="" type="checkbox"/> Expanding existing business capacity by adding newly-hired employees to an existing function; and</p> <p><input checked="" type="checkbox"/> Opening specific new plants or facilities, expanding or upgrading existing facilities, and/or repurposing existing unused space/buildings or facilities.</p>

**Modifications from Standard**

<input checked="" type="checkbox"/> Weighted Average Hours over 45	48 Hours for Job Creation trainees (Job 2)
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The Company’s training plan is complex and its employees need extensive training in all facets of cyber security monitoring and investigating activities.

Security On-Demand is a 24 hours a day and 7 days a week operation. Security threats occur around-the-clock. Customers demand rapid response including analysis and recommended corrective action, requiring the Company’s frontline employees to be fully skilled and knowledgeable of threats and solutions.

Workers in highly-technical computer software positions must complete an extensive knowledge and skills training program. The training program will support continuous technological improvements to keep pace with the rapidly changing computer security/threat protection industry.

<p><b>Training Infrastructure &amp; Administrative Plan</b></p>	<ul style="list-style-type: none"> <li>• <b>Coordination of Training (Oversight):</b> The Company’s Chief Administrative Officer will oversee the overall administration and implementation (coordinating &amp; scheduling) of training with assistance of Department Managers who will schedule and deliver training.</li> <li>• <b>Trainers:</b> In-house subject matter experts including the Company’s Owners; Chief Technical Officer; Director of Security Operations; Department Managers; and vendors, if necessary. Training will start at contract approval.</li> <li>• <b>Administrative Duties:</b> The Chief Administrative Officer will lead the training project with help from support staff. The Company also retained an administrative subcontractor to assist with project administration.</li> </ul>
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**RECOMMENDATION**

Staff recommends approval of this proposal and modifications

**SUBCONTRACTORS**

Subcontractor Type	Subcontractor Name	City	Cost / %
<ul style="list-style-type: none"> <li>• Development</li> </ul>	Training Funding Source	Seal Beach	\$4,900
<ul style="list-style-type: none"> <li>• Administrative</li> </ul>	Training Funding Source	Seal Beach	Not to exceed 13%
<ul style="list-style-type: none"> <li>• Training Vendors</li> </ul>	To Be Determined	N/A	N/A

## **Exhibit B: Menu Curriculum**

### **Class/Lab and E-Learning Hours**

8 – 200

Trainees may receive any of the following:

#### **BUSINESS SKILLS**

- ✚ Administrative Processes & Procedures
- ✚ Coaching/Communication
- ✚ Customer Relations
- ✚ Goal Setting
- ✚ Leadership
- ✚ Marketing & Business Development/Sales
- ✚ Planning
- ✚ Time Management

#### **COMMERCIAL SKILLS**

- ✚ Agile Methodology
- ✚ Angular Methodology
- ✚ Audit Platforms
- ✚ Bio-immune system response, behavioral analytics, and machine learning
- ✚ Business Writing
- ✚ Change Management Processes
- ✚ Client Portal
- ✚ Disaster recovery for customers
- ✚ De-Commissioning Process
- ✚ Engineering & System Design
- ✚ Health Insurance Portability and Accountability (HIPAA)
- ✚ Identity & Process Alert Management Strategy Development
- ✚ Incident Response
- ✚ ITIL (Information Technology Infrastructure Library)
- ✚ Microsoft Office/Project/One Note
- ✚ OSI (Open Systems Interconnection) Model
- ✚ Payment card industry (PCI)
- ✚ Product/Service Knowledge
- ✚ Provisioning Process
- ✚ Quality Assurance Plan
- ✚ Request for Proposal (RFP)
- ✚ Risk Assessments-Cyber
- ✚ Risk Register
- ✚ Security Awareness
- ✚ Security Operations: Networks/Systems/Response/Maintenance
- ✚ Service Reviews/ Audits
- ✚ Sarbanes Oxley (SOX)
- ✚ Simple Certificate Enrollment Protocol (SCEP)
- ✚ Standard Operating Procedures (SOPs)
- ✚ Systems Integration & Testing
- ✚ Triage and Analysis
- ✚ Vendor Product Offerings

**COMPUTER SKILLS**

- Adobe (PDF, InDesign, Photoshop, Illustrator, etc.)
- AQuery Database
- Audit & Compliance
- Certified Wireless Network Administrator (CWNA)
- Certified Information Systems Security Professional, CISSP, CISA, CISM, & other related
- Cisco Adaptive Security Appliance (ASA) CCNA Security
- Cisco Certified Network Professional (CCNP)
- Cisco IPS Firepower
- Cloud Solutions
- Crystal Reports
- Customer Relationship Management (CRM)
- E-Mail marketing tools (Act ON, Survey Monkey, GoldMine)
- ERP (ServiceNow)/Quickbooks/SAP
- EDR – Endpoint Detection & Response
- Federal Information Security Management (FISMA)
- Federal Risk and Authorization Management Program (FEDRAMP)
- Firewall Admin (Checkpoint, Palo Alto, SonicWall, Cisco, Watchguard, Microsoft)
- Firewall Manufacturer Certifications
- ForeScout Network Access Control
- Fortinet Firewall NSE 4 – 8 level
- Imperva & Trustwave & Fortinet Web Application Firewall (WAF)
- Microsoft Office/ Project
- Microsoft Certified Systems Engineer (MCSE)
- MS Exchange
- Network Access Control (NAC)/Protection, Application Protection, Endpoint Protection
- .Net/Angular/Java/SQL/Python/PERL/RegEx/C# Development
- Network + Certification
- Payroll/HR
- Reputada
- Sales Force
- Sharepoint
- Security + Certification
- Security Professional
- Service Now Ticket System
- SolarWinds
- SPSS – Microsoft Report Manager/Creator
- SQL Reporting
- Statement on Standards for Attestation Engagements (SSAE)-16
- SOC 2, Type II Certification
- Talent Learning Management System (LMS)
- ThreatWatch v5
- Threat Deterrence, Simulation and Response,
- ThreatWatch@ Threat Analytics
- Threat Recon Unit (TRU)
- Time tracking & Time & Billing system
- VM Ware
- WordPress, Web Design and Graphics Software

**CONTINUOUS IMPROVEMENT**

- ✚ Agile (DevOps) & SCRUM
- ✚ CAPA/RCA
- ✚ Performance Improvement
- ✚ Process/Quality Improvement/Efficiency /Workflow
- ✚ Quality Management Office (QMO)
- ✚ SCEP (SOD Customer Excellence Program)
- ✚ Six Sigma
- ✚ Teamwork & Collaboration

**Productive Lab Hours (1:1 training ratio)**

0 – 24

**COMPUTER SKILLS**

- Security Systems Operations
- Threatwatch

Reimbursement for retraining is capped at 200 total hours, per trainee, regardless of method of delivery.
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**Delegation Order**

**Training Proposal for:  
Seersoft, Inc. dba CA Rehabilitation Specialists**

**Small Business**

**ET19-0211**

**Approval Date:** August 18, 2018

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

**CONTRACTOR**

- Type of Industry: Healthcare
  
- Number of Full-Time Employees
  - California: 48
  - Worldwide: 48
  - Number to be trained: 60
  - Owner  Yes  No
  
- Out-of-State Competition: No OSC
- Special Employment Training (SET):  Yes  No
- High Unemployment Area (HUA):  Yes  No
- Turnover Rate: 12%
- Repeat Contractor:  Yes  No

**FUNDING**

- Requested Amount: \$65,208
- In-Kind Contribution: \$134,400

**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 SET Priority Rate SB <100	Business Skills, Computer Skills, Commercial Skills, MS Clinical w/Preceptor, MS Didactic	48	8-200	0	\$1,040	\$22.77
				Weighted Avg: 40			
2	Retrainee SET Job Creation Initiative Medical Skills Training Priority Rate	Business Skills, Computer Skills, Commercial Skills, MS Clinical w/Preceptor, MS Didactic	12	8-200	0	\$1,274	*\$13.25
				Weighted Avg: 49			

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

- Reimbursement Rate: Job #'s 1 & 2: \$26 Small Business Rate
- County(ies): Los Angeles
- Occupations to be Trained: Registered Nurses, Licensed Vocational Nurses, Business Development/Revenue Cycle Staff, Pathologists, Registered Physical Therapists, Occupational Therapists, Administration Staff, Medical Assistant/Nurse Practitioners
- Union Representation:  Yes  
 No
- Health Benefits: Job # 1: \$2.50 per hour

**SUBCONTRACTORS**

- Development Services: Cal Training of Upland, CA provided development services for a flat fee of \$6,000.
- Administrative Services: Cal Training will also provide administrative services for a fee not to exceed 13% of payment earned.
- Training Vendors: N/A

**OVERVIEW**

Founded in 2007, Seersoft, Inc. dba California Rehabilitation Specialists (CalRehab) offers services in physical, occupational and speech therapy. CalRehab originally started as a



medical billing and accounting firm but later added therapy and staffing services to remedy an underserved field. The Company's referrals come directly from acute care hospitals, insurance adjusters, physicians, clinics and other healthcare providers. This will be the Company's second ETP Agreement, the second in the last five years.

## Training Plan

The Affordable Care Act continues to impact healthcare facilities such as CalRehab. CalRehab will provide training to medical staff to ensure they meet federally mandated requirements for documentation procedures. To remain in compliance, the Company has upgraded its Electronic Health Records for the second time to ensure staff are knowledgeable in the most current revisions made to Rehabilitation Billing and Coding.

CalRehab also purchased new equipment that will increase the number of physical therapy offerings for patients, and expanded company business lines and programs. New programs include Tele Health, Transitional Health, Home Visits, and Nerve Conduction Velocity studies. Trainees will receive medical training to implement new techniques and methods in nerve/physical therapy. Staff will also learn to operate new equipment such as the Dynatron Laser and a new Biofeedback device. Biofeedback training will help medical staff determine the type of feedback required for the patient: brainwave, breathing, heart rate muscle, sweat glands, and temperature.

**Business Skills:** Training will be offered to all occupations to improve employee problem solving skills and ability to plan and increase team building skills.

**Commercial Skills:** Training will be offered to Therapists, Physical Therapy Assistants, and Pathologists to ensure staff provide quality rehabilitation services to improve patient medical needs.

**Computer Skills:** Training will be offered to all occupations to ensure staff can utilize computer software programs. These systems are used to document patient care and daily reporting.

**Medical Skills Training:** Training will be offered to Registered Nurses, Licensed Vocational Nurses, Pathologists, Physical Therapists and Assistants. Training will ensure staff is current with new medical procedures and techniques used in the healthcare industry. In addition, medical staff will receive preceptor training to improve employee nursing skills and level of patient care.

## Retrainee - Job Creation

CalRehab has committed to hiring 12 new employees (Job Number 2). Newly hired Nurses and Therapists will receive up to 200 hours of training in Commercial and Medical Skills training. This training will equip medical staff with the skills needed to deliver quality care, and better familiarize staff with one-on-one interaction with patients. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

## Special Employment Training

Under SET, the participating employer is not required to demonstrate out-of-state competition. To qualify under SET, trainees must be earning at least the statewide average hourly wage (\$22.77) at the end of the retention period.

➤ **Training Infrastructure**

The President of CalRehab, Ailene Rivera, will oversee this training project. CalRehab has hired a third party administrator to work alongside its Human Resource Staff to complete administrative duties. Management will schedule all training, and ensure ETP documentation requirements are met.

**Full-Time Employment Waiver Request**

To be considered full-time, CalRehab employees must work at least 30 hours per week. Under the Affordable Care Act a full time employee is defined as any employee with an average of at least 30 hours of service per week (26 U.S. Code § 4980H(c)(4)). Trainees in this Agreement work a minimum of 30 hours per week.

CalRehab requests to revise the minimum number of hours for full-time work in the Agreement from 35 to 30 in order to reach trainees that otherwise would not have qualified. The Panel may approve a workload of less than 35 hours on a case-by-case basis.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0213	Encino	08/04/14- 08/03/16	\$99,110	\$65,350 (65%)

Performance was low due to a huge push on training for staff at the beginning of the Agreement, but over time, trainers were not available to schedule training as initially anticipated. Seersoft also faced turnover, resulting in trainees not completing the 90-day retention period and no longer being eligible for reimbursement. In addition, the Company experienced difficulty in recruiting and filling open positions with Seersoft while competing with hospitals and other care facilities in the area.

For this proposal, the President of the Company has a much better understanding of the training process and has worked with internal instructors to ensure training is scheduled and delivered in a timely manner and recruitment of new medical staff remains on-going. Funding in this proposal has been rightsized to reflect prior earnings.

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

8-200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- AIDET
- Conflict Resolution
- Contract Negotiation
- Leadership
- Statistics
- Strategic Planning
- Team Building

**COMMERCIAL SKILLS**

- Aquatic Therapy
- Brain Injury Rehabilitation
- Cardiac Rehabilitation
- Cold Laser Therapy
- Conditioning Protocol for Therapy Patients
- Functional Capacity
- Functional Restoration
- Hyperbaric Oxygen
- Occupational Therapy Skills
- Stroke Rehabilitation
- Speech & Language Pathology Skills
- Physical Therapy Skills
- Respiratory Assessment & Care
- Respiratory Care Practitioner Skills

**COMPUTER SKILLS**

- Electronic Medical Records Application Skills
- MS Office (Intermediate & Advanced ONLY)
  - Word
  - Excel
  - PowerPoint
- Nordin Medicare Endeavor
- Patient Billing & Accounts Receivable (PBAR)

**MEDICAL SKILLS-DIDACTIC**

- Arterial Blood Gas Interpretation (ABG)
- Annual Skills Updates
- Basic Life Support (BLS)
- Biofeedback

- Body Mechanics
- Equipment Skills
- Ergonomics
- Functional Restoration
- Infection Control
- Mobility Assessment
- Passy-Muir Valve Placement (PMV)
- Patient Assessment & Care
- Rehabilitative Nursing Skills
- Safe Patient handling
- Splint Assessments & Measurements
- Telemedicine
- Ventilator & Tracheotomy Care
- Wheelchair Assessment
- Wound Care

### **MEDICAL SKILLS-PRECEPTOR**

- Work Conditioning Protocol for Therapy Patients
- Occupational Therapy Skills
- Patient Assessment & Care
- Physical Therapy Skills
- Rehabilitative Nursing Skills
- Respiratory Care Practitioner Skills
- Speech & Language Pathology Skills

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



**Training Proposal for:  
SingerLewak, LLP**

**Agreement Number: ET19-0274**

**Approval Date:** September 18, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** L. Vuong

**PROJECT PROFILE**

Contract Attributes:	Retrainee	Industry Sector(s):	Financial Services  Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Counties Served:	Los Angeles, Orange, Riverside, San Francisco, Santa Clara	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 300	U.S.: 320	Worldwide: 320
<u>Turnover Rate:</u>	2%		
<u>Managers/Supervisors:</u> (% of total trainees)	17%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$72,588		\$0	\$0		\$72,588

In-Kind Contribution:	100% of Total ETP Funding Required	\$111,545
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee	Business Skills, Commercial Skills, Computer Skills, Continuous Impr.	263	8-200	0	\$276	\$16.70
				Weighted Avg: 12			

**Minimum Wage by County:** \$16.70 per hour for Riverside County; \$17.50 per hour for Orange County; \$17.54 per hour for Los Angeles County; and \$18.22 per hour for San Francisco and Santa Clara 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

**Wage Range by Occupation**

Occupation Titles	Wage Range	Estimated # of Trainees
Project Director		17
Manager		45
Senior Accountant		131
Staff Accountant		68
HR Staff		2

**INTRODUCTION**

Founded in 1959 and headquartered in Irvine, SingerLewak, LLP (SingerLewak) is an accounting firm that provides tax and business advisory services to publically and privately held real estate, manufacturing and distribution companies, life science and technology companies, as well as non-profit organizations. The Company serves clients in California and the Western U.S. through its eight California offices (Irvine, Los Angeles, Pomona, Riverside, San Francisco, San Jose, Torrance, Woodland Hills) and Denver.

**PROJECT DETAILS**

SingerLewak faces challenges related to ongoing changes in industry requirements, customer demands, complex financial strategies, tax liabilities, technology advances and the continued training demand for incumbent workers. To remain competitive, SingerLewak must train to compete in a highly demanding market and exceed customer expectations and demands. In addition, the Company has implemented new services such as international sales tax and revenue planning, and a new payroll software, Stratustime. These changes will help the Company expand business, attract new customers and develop a more knowledgeable workforce in a constantly changing environment.

Over the last two years, SingerLewak's workforce has grown from 207 to 300 employees. The Company has opened two new locations in Riverside and Torrance and experienced a 15% growth in business. The Company strives for creativity and innovation and has developed a strategy to retain skilled workers, remain competitive, attract new customers and promote continued growth.

This will be SingerLewak's second ETP project, its second in the last five years. The previous proposal focussed on basic financial and tax planning and changes in the industry and government requirements. In this proposal, SingerLewak will provide training in new financial planning and strategy, new software and upgraded worker job skills.

## Training Plan

SingerLewak's goal is to provide training in professional tax and financial services and products, deliver excellent customer service, improve overall workforce competency and facilitate employee job satisfaction through skill developments. Training will improve business functions that support operations as the Company continues to grow.

Classroom/Laboratory and Videoconference training will be provided as follows:

**Business Skills:** This training will be offered to all occupations. Training will focus on customer service, client management and the skills necessary to professionally interface with clients. Trainees will learn to perform business related tasks with greater knowledge and interact more effectively with internal and external customers.

**Commercial Skills:** This training will be offered to all occupations to focus on continuously changing compliance rules and requirements. Trainees will learn new and updated industry information to better serve customers and improve skills to excel in their jobs.

**Computer Skills:** This training will be offered to all occupations in various software applications and in the skills necessary to support business operations. Trainees will gain knowledge and skills to use the Company's automated systems and provide efficient and effective customer service.

**Continuous Improvement:** This training will be offered to all occupations to focus on streamlining operations and provide a seamless procedure for their clients. The Company is implementing changes and procedures to ensure processes are consistent and requirements are met.

## Commitment to Training

The Company spends nearly \$460,000 annually on training for its eight California offices. Recent training includes Sexual Harassment Prevention, New-Hire Orientation, Diversity, Conflict Resolution, Safety and other required training. In addition, various job-specific skills training is provided as necessary to ensure competency in a given position.

ETP funds will not displace the existing financial commitment to training.

### ➤ Training Infrastructure

Training is scheduled to begin upon Panel approval and will be delivered on-site by in-house staff and vendors as needed. SingerLewak has designated a Director of Training and staff at each location to manage and oversee ETP training and administrative responsibilities. SingerLewak

has also retained a third party administrator for enrollment, date tracking and invoicing. (See Administrative Services below)

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET17-0146	Los Angeles, Irvine, San Francisco, San Jose, Woodland Hills	08/01/16 – 07/31/18	\$122,400	\$79,125 (65%)

Although SingLewak only achieved 65% of its expected earning, 172 trainees completed training and retention for a total of 5,275 eligible hours.

Poor performance is attributed to improper training documentation and postponement of training due to producing demands. To ensure the success of this proposal, the Company has taken corrective action and hired a designated Director of Training to more closely oversee ETP training and administrative responsibilities, with emphasis on detailed management of training schedules and proper ETP documentation. In addition, the Company has designated staff at each location to manage and collect all training data and report to the Director of Training. Training plans will also be better coordinated with management to ensure it does not conflict with business demands. This proposal has been rightsized to more closely match prior performance.

### **DEVELOPMENT SERVICES**

SingerLewak retained Training Refund Group (TRG) in Anaheim to assist with development for a fee of \$5,000.

### **ADMINISTRATIVE SERVICES**

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

### **TRAINING VENDORS**

To Be Determined



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

8-200

Trainees may receive any of the following:

**BUSINESS SKILLS:**

- Sales Technique
- Leadership
- Presentation Skills
- Report Writing
- Marketing and Sales
- Conflict Resolution
- Networking
- Client Management
- Business Operations
- Business Planning
- Customer Service

**COMMERCIAL SKILLS**

- Accounting & Auditing Updates
- Fraud Prevention
- Tax Planning
- Tax Preparation
- Bank Review
- Estate Planning
- Financial Planning
- Clients' Benefit Plans
- Best Practices

**COMPUTER SKILLS**

- Microsoft Office (Intermediate & Advanced)
- Quickbooks
- ProSystem FX Tax Software
- Tax Research
- IDEA Data Analytics Software
- Payroll Software (Paycheck & Stratustime)

**CONTINUOUS IMPROVEMENT**

- Process Improvement
- Project Management
- Best Practices

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



**RETRAINEE - JOB CREATION**

**Training Proposal for:**

**The Sygma Network, Inc.**

**Agreement Number: ET19-0253**

**Approval Date:** September 18, 2018

**ETP Regional Office:** Sacramento

**Analyst:** C. Kaiser

**PROJECT PROFILE**

Contract Attributes:	Priority Rate Retrainee Job Creation Initiative HUA SET Veterans	Industry Sector(s):	Warehousing Transportation/Logistics  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Joaquin	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: 140	U.S.:140	Worldwide: 66,500
<u>Turnover Rate:</u>	2%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$64,220		\$0	\$0		\$64,220

<b>In-Kind Contribution:</b>	100% of Total ETP Funding Required	\$135,000
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee HUA Priority Rate SET	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, PL- Comm Skills	115	8-200	0	\$1,222	*\$12.53
				Weighted Avg: 19			
2	Job Creation HUA Priority Rate SET	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, PL- Comm Skills	3	8-200	0	\$1,222	*\$11.00
				Weighted Avg: 57			
3	Veterans HUA Priority SET	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, PL- Comm Skills	2	8-200	0	\$884	*\$12.53
				Weighted Avg: 57			

\*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 Numbers 1 & 3: \$12.53 per hour for San Joaquin County.  
Job Number 2: \$11.00 per hour for San Joaquin 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
<b>Job Number 1:</b>		
Administrative Staff		5
Customer Service Staff		5
Leads		5
Technical Staff		7
Transportation Staff		40
Warehouse Staff		53
<b>Job Number 2:</b>		
Administrative Staff		1
Transportation Staff		1
Warehouse Staff		1
<b>Job Number 3:</b>		
Transportation Staff		1
Warehouse Staff		1

## **INTRODUCTION**

Founded in 1984 and located in Stockton, The Sygma Network, Inc. (Sygma) ([www.sygmanetwork.com](http://www.sygmanetwork.com)) warehouses, distributes, and delivers a broad range of food products, beverages, food-service equipment, and supplies to chain restaurants throughout Northern California. The Company distributes to chain restaurants representing 32 food concepts. Customers include restaurants such as Panda Express, Checkers, Jenny Craig and Rally's. Sygma is a wholly owned subsidiary of Sysco Corporation located in Houston, Texas; however, Sygma operates out of a single site in Stockton.

This is Sygma's second ETP Agreement and the second in the last five years.

### **Veterans Program**

The Panel has established a higher reimbursement rate and other incentives for training California veterans. Sygma has identified 2 Veterans to be trained (Job Number 3).

## **PROJECT DETAILS**

Sygma's first agreement focused on improving operational efficiencies, computerized truck shipments, and wireless order tracking. In this proposal, Sygma will build on training in the prior proposal. There will be no duplication of training.

In this proposal, Sygma will be implementing additional smartphone software and methods such as iPhone and Android applications to improve efficiency, productivity levels and profitability. Sygma is expanding on current technology and plans to adopt additional handheld devices for transportation, warehouse, and customers.

Additionally, Sygma has seen a 4% growth in the last year and projects an additional 5% growth over the next 2 years due to an increase in customer needs and new contracts. Training in communication, problem solving, improving customer contact and new equipment will allow the Company to process orders efficiently.

### **Retrainee - Job Creation**

In support of Job Creation, the Panel offers incentives to companies that commit to hiring new employees. Trainees will be subject to a lower post-retention wage.

Sygma is expanding business capacity by hiring new employees. With growth, the Company needs to hire Administrative Staff, Transportation Staff, and Warehouse Staff to manage accounts and make sure warehousing and delivery are executed on time. Sygma will hire 3 new employees (Job Number 2). The date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. Trainees will be hired into "net new jobs" as a condition of contract.

### **Training Plan**

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

**Business Skills:** Training will be offered to all occupations. Training topics include Category Management and Time Management. Trainees will learn customer service and managing expectations.

**Commercial Skills:** Training will be offered to Warehouse and Transportation staff. Training topics include Product Handling and Order Selection Procedures. Trainees will learn how to select product and load trailers.

**Computer Skills:** Training is offered to all occupations. Training topics include Smartphone Applications and TELOGIS Transportation System. Trainees will receive advanced training on current software platforms.

**Continuous Improvement:** Training is offered to all occupations. Training topics include Critical Thinking, Quality Assurance, and Team Communication. Training will help employees improve quality and problem solve more efficiently.

### **Productive Laboratory (PL)**

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

PL training will be provided to Transportation Staff and Warehouse staff in Commercial Skills to supplement Class/Lab training. PL training will strengthen employee skills on equipment, including forklifts, lifts, tractors, trailers, transportation equipment, transportation electronic tablets, and STS Driver Pro scanners. Trainees will be instructed on operating procedures while they observe the trainer. Trainees will then operate the equipment independently as the trainer observes and offers coaching. During PL training, output and productivity is expected to decrease. After successful completion of a PL training course, the trainer will certify competency.

All PL training will take place onsite. Trainees will receive up to 60 hours of PL training with a 1:3 trainer-to-trainee ratio. The Company requires a higher ratio due to the limited number of equipment and trainers. As most equipment is in constant use, it is necessary to optimize the trainer and trainee's time when the equipment is available.

### **Commitment to Training**

The Company's annual training budget is approximately \$140,000 for training that includes updated processes, continuing employee development, and job specific training.

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

#### ➤ Training Infrastructure

Training will be provided by qualified in-house trainers. Sygma has designated the Training Specialist to oversee the ETP Contract. In addition, the Company has also retained the services of a third-party with extensive ETP experience to assist with administration.

### **SET/HUA**

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 Numbers 1-3 work in San Joaquin County, a High Unemployment Area (HUA) with unemployment exceeding the state average by 25%. The Panel may modify the ETP

Minimum Wage for these trainees by up to 25% if post-retention wages exceed the start-of-training wages. Sygma is requesting a wage modification for Job Numbers 1-3.

### **Temporary to Permanent Hiring**

The three trainees in Job Number 2 meet Panel guidelines for “temporary to permanent” employment. Sygma has retained these employees through the temporary agency, Hedy Holmes in Stockton, with the intention of hiring them into full-time, permanent positions after training. The average time for “converting” temporary workers to full time employment is 6 months. Health benefits are offered 3 months after the permanent hire date.

These trainees must be determined eligible to participate in ETP-funded training before the start of training, while on payroll with the temporary agency. (Unemployment Insurance Code Section 10201(c).) However, the retention and post-retention wage requirements cannot be satisfied until after they have been hired by the Sygma. Until then, Sygma will not receive progress payments.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0394	Stockton	3/2/16 – 3/1/18	\$88,780	\$64,214 (72%)

Training was delayed because of an increase in customer orders. Sygma has hired additional employees to adequate staff to meet customer demand during funded training. The current proposal has been “right-sized” consistent with prior earnings to ensure success.

### **DEVELOPMENT SERVICES**

Sygma retained National Training Company in Irvine to assist with development of this proposal for a flat fee of \$5,000.

### **ADMINISTRATIVE SERVICES**

National Training Company 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 hours Trainees may receive any of the following:

#### **BUSINESS SKILLS**

- Category Management
- Handling Difficult Customers
- Improving Customer Contact
- Operating Procedures
- Time Management

#### **COMMERCIAL SKILLS**

- Best Practices
- Diagnosing Electrical System Problems
- Order Selection Procedures
- Preferred Work Methods
- Product Handling
- Repairing Computer Controlled Systems

#### **COMPUTER SKILLS**

- Android Applications
- Android Oreo
- iPhone Applications
- Laptop Techniques
- Microsoft Office (Intermediate and Advanced)
- Microsoft Outlook Contact Management
- Smartphone Applications
- SYGMA Desktop Applications
- SYGMA Warehouse Management
- TELOGIS Transportation System

#### **CONTINUOUS IMPROVEMENT**

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

## **Productive Lab Hours**

0-60 hours     Trainees may receive any of the following:

### **COMMERCIAL SKILLS** (1:3 trainer-to-trainee ratio)

- Forklift
- Lifts
- STS Driver Pro Scanner
- Tractors
- Trailers
- Transportation Equipment
- Transportation Electronic Tablets

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





**Training Proposal for:  
Werner Systems, Inc.**

**Delegation ≤ \$75,000 Single Employer**

**ET19-0250**

**Approval Date:** September 13, 2018

**ETP Regional Office:** San Diego

**Analyst:** C. Clady

**CONTRACTOR** [www.wernerengineering.com](http://www.wernerengineering.com)

- Type of Industry: Construction (C)  
Construction (23)  
Priority Industry:  Yes  No
- Number of Full-Time Employees  
California: 181  
Worldwide: 181  
Number to be trained: 96
- Out-of-State Competition:  Yes  No
- Special Employment Training (SET):  Yes  No
- High Unemployment Area (HUA):  Yes  No
- Turnover Rate: 8%
- Repeat Contractor:  Yes  NO

**FUNDING**

- Requested Amount: \$73,008
- In-Kind Contribution: \$121,223

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	ETP Required Wage
				Class / Lab	CBT		
1	Priority	Computer Skills, Business Skills, Continuous Impr, Manufacturing Skills, PL-Mfg Skills, OSHA 10/30	86	8-200	0	\$728	\$17.50
				Weighted Avg: 28			
2	Job Creation Priority	Business Skills, Computer Skills, Continuous Impr, Manufacturing Skills, PL-Mfg Skills, OSHA 10/30	10	8-200	0	\$1,040	*\$14.58
				Weighted Avg: 40			

It will be made a condition of contract that trainees will never be paid less than the statewide or local minimum wage rate in effect at the end of retention regardless of wage expressed in this table & Contract.

- Reimbursement Rate: Job #1: \$26 Priority/ Program Initiatives  
Job #2: \$26 Priority / Program Initiatives
- County(ies): Orange County
- Occupations to be Trained: Engineering Staff, Administration staff, Production Staff, Supervisors/Managers.
- Union Representation for Trainees:  Yes  No
- Health Benefits: (Employer Paid to Meet ETP Wage)  No  Yes  
Up to \$2.50 /hour may be included to meet ETP Required Wage for Job Numbers 1 & 2.

**OVERVIEW**

<b>Year Company Founded:</b>	2001	<b>Company Headquarters:</b> <input type="checkbox"/> Single location Tustin, CA
<b>Total Number of Facility locations in California</b>	2	
<b>Facility location(s) where training will occur</b>	• <b>Tustin ( Orange County) (2)</b>	
<b>Nature of Business</b>	Werner Systems, Inc. (Werner) specializes in design, engineering, and fabrication of windows frames, and other exterior structures for medium high-rise buildings.	
<b>Customer Base:</b>	Architects, Designers, General Contractors, Glazing, and Waterproofing Consultants.	

<b>Business / Industry Needs / Changes</b>	High demand for services and increased quality in the window design industry requires the Company to improve efficiency. Werner plans to hire new staff to meet customer demand. The Company also invested in new software and quality manufacturing equipment. New software will improve project methods and increase accuracy in the fabrication shop and new equipment will improve processes.
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**Training Plan:**

<b>Need for Training:</b>	<ul style="list-style-type: none"> <li>• The Company recently implemented Office 365 software. Various occupations including Engineering Staff, Production Staff, and Management Staff will be trained on different applications.</li> <li>• Continuous Improvement Skills and Business Skills training will also be provided to all departments including Administration, Production shop, and Engineering.</li> <li>• Manufacturing Skills will be provided to Production and Engineering Staff on various equipment to include forklifts, material handling and fabrication of window/panels. Training will also allow employees to remain current with industry standards and processes.</li> </ul>
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Training courses listed in the Menu Curriculum will be provided via the following training method(s) under the following Types of Training:

- Class/lab     
  E-Learning     
  CBT     
  Productive Lab

<b>Business Skills</b>	<b>Continuous Improvement</b>	<b>Computer Skills</b>
<b>Manufacturing Skills</b>		

<b>Certified Safety Training</b>	<input checked="" type="checkbox"/> OSHA 10/30 <input type="checkbox"/> HAZWOPER <input type="checkbox"/> Hazardous Materials (HAZMAT)
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<b>Productive Laboratory</b>	<b>Justification:</b> <input checked="" type="checkbox"/> New Equipment <input checked="" type="checkbox"/> New Production Procedures <input type="checkbox"/> Certification Standards
	40 PL Hours per-trainee
	<b>Occupations Receiving PL Training:</b> Production, Engineering, Supervisors/Managers
The PL instructor must be dedicated to training.	
<b>Ratio Higher than 1:1</b>	1: 2 Production requires a team of 2 workers.

<b>Job Creation Justification</b>	<input checked="" type="checkbox"/> Expanding existing business capacity by adding newly-hired employees to an existing function
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<b>Training Infrastructure &amp; Administrative Plan</b>	<ul style="list-style-type: none"> <li>• <b>Coordination of Training:</b> The Company’s Human Resource Manager will oversee the overall administration and implementation (coordinating &amp; scheduling) of training. Training will be conducted at two locations.</li> <li>• <b>Trainers:</b> There will be 5-6 In-house subject-matter experts, Supervisors, and Managers delivering training. Vendors may be used, if necessary.</li> <li>• <b>Administrative Duties:</b> Werner Systems will contract with an administrative subcontractor to assist with project administration.</li> </ul>
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**RECOMMENDATION**

Staff recommends approval of this proposal and modifications

**SUBCONTRACTORS**

<b>Subcontractor Type</b>	<b>Subcontractor Name</b>	<b>City</b>	<b>Cost / %</b>
• Development	Training Funding Source	Seal Beach, CA	\$ 4,900
• Administrative	Training Funding Source	Seal Beach, CA	13%
• Training Vendors	To Be Determined		N/A

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

8-200 Trainees may receive any of the following:

**BUSINESS SKILLS**

- Accounting/Auditing
- Coaching
- Communication
- Credit & Collection Skills
- Customer Relations
- Goal Setting
- Inventory Control
- Leadership
- Product Knowledge
- Project Management
- Time Management
- Writing

**MANUFACTURING SKILLS**

- Equipment Operations/Maintenance
- Green Building Techniques
- Inspection Techniques
- Inventory Control-Cycle Counting
- Leadership Energy Environmental Design (LEED)
- Manufacturing Techniques
- Production/ Manufacturing Techniques
- Quality Control
- Shop Drawings-Computer Aided Design( CAD) Drawings
- Warehouse Procedures (Shipping, Receiving, Order Picking/Packing)

**OSHA 10 & 30 (OSHA Certified Instructor)**

- OSHA 10
- OSHA 30

**COMPUTER SKILLS**

- 3D Computer Aided Design (CAD)
- Adobe
- Auto Computer Aided Design (CAD) Office 365
- Blue Beam
- Inventor
- Manufacturing Advisory Service (MAS) 500
- MS Project
- Report Generation

**CONTINUOUS IMPROVEMENT**

- Change Management
- Hazard Analysis and Critical Control Points (HACCP)
- Performance Improvement
- Process/Quality Improvement

**PL Hours**

0 – 40

**MANUFACTURING SKILLS**

- Equipment Operations/Maintenance
- Fab./ Assembly of Windows, Panels
- Glass Handling and Glass Storage
- Identification of Symbols and Isometric Drawings
- Identifying Glass Types
- Materials Handling and Storage
- Mock Up's Product Knowledge
- Production Shop Operational Procedures
- Tool Identification

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



**DELEGATION ORDER**

**RETRAINEE - JOB CREATION**

**Training Proposal for:**

**YDesign Group LLC**

**Agreement Number: ET19-0237**

**Approval Date:** September 18, 2018

**ETP Regional Office:** San Francisco Bay Area

**Analyst:** R. Jackson

**PROJECT PROFILE**

Contract Attributes:	Retrainee	Industry Sector(s):	Wholesale Trade Services Retail  Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Counties Served:	Sacramento, Contra Costa	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: 225	U.S.: 227	Worldwide: 227
<u>Turnover Rate:</u>	9%		
<u>Managers/Supervisors:</u> (% of total trainees)	6%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$74,800		\$0	\$0		\$74,800

In-Kind Contribution:	100% of Total ETP Funding Required	\$80,766
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement	70	8-200	0-37	\$920	\$16.80
				Weighted Avg: 40			
2	Retrainee Job Creation	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement	10	8-200	0-37	\$1,040	*\$14.00
				Weighted Avg: 40			

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

**Minimum Wage by County:** Job 1: \$18.22 for Contra Costa County, \$16.80 for Sacramento County. Job 2: \$15.18 Contra Costa County and \$14.00 for Sacramento County.  
**Health Benefits:**  Yes  No This is employer share of cost for healthcare premiums – medical, dental, vision.  
**Used to meet the Post-Retention Wage?:**  Yes  No  Maybe  
 Up to \$2.50 per hour may be used to meet the Post-Retention Wage in Job Number 1. Up to \$2.18 may be used in Contra Costa County and up to \$1.00 may be used in Sacramento County in Job Number 2.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Customer Service		25
Merchandiser		16
Manager		5
Sales		25
<b>Job Number 2 (Job Creation)</b>		
Sales		8
Customer Service		1
Merchandiser		1

**INTRODUCTION**

Established in 2001, and headquartered in Walnut Creek, YDesign Group LLC, (YDesign)(www.ydesigngroup.com), is an online retailer offering high-end home and commercial lighting, modern furniture and decorative plumbing products from hundreds of luxury focused



manufactures. In the Sacramento region, they also offer in-house lighting design services. Customers include residential home consumers, trades professionals (designers, architects, electricians and construction contractors) and larger contractors such as hotel or restaurant chains.

In 2017, YDesign acquired Lumens Light and Living LLC, (Lumens), now a subsidiary and located with YDesign's facilities in Walnut Creek and Sacramento. This proposal includes training for employees of YDesign and Lumens.

Although this is YDesign's first ETP proposal, it is the second in the past five years for Lumens. The first project for Lumens concentrated on companywide skills upgrades leading to greater efficiency and profitability. The project included a Job Creation component and the Company requested support for training as they expanded into new online retail markets with new products (Home Furnishings). Lumens's last ETP agreement earned 92% of the requested amount (\$49,896).

Training in this proposal will target three departments (Sales, Customer Service, and Merchandising) with facilitating process and procedural changes. An expanding customer base in global markets and company priorities such as building career ladders, upgrading skills for Sales staff and Customer Service experts, and upgrading marketing skills requires training. Only new training content is offered to trainees under this proposal.

In order for YDesign to maintain a competitive position, it must hire additional staff. For the Job Creation retrainees, a substantial number of training hours will be in Commercial Skills (50%). The 10 new employees will be placed to work in the existing location in Sacramento where recent office expansions have occurred and are estimated at approximately 3,000 additional square feet.

## **PROJECT DETAILS**

Changes in lighting products led YDesign to target a certified training provided by American Lighting Association. A new development called Organic light-emitting diode (OLED), requires skill upgrade training for Sales Staff as staff provides specialized consulting services for customers with a variety of lighting needs. Consulting services includes highly technical product information and troubleshooting items to specifications based on variables such as environment and correlating switches in addition to aesthetic considerations.

Additionally, YDesign recently implemented upgraded and new software and shipping/logistics procedures (estimated \$480,000 investment) to maintain and improve customer support and speed delivery times. These systems are used by Sales, Merchandising and Customer Service staff.

The proposed training supports new market expansions into the luxury product offering niche YDesign presently occupies and will help meet the following strategic goals:

- Achieve new certification from American Lighting Association.
- Create upward mobility to advance generalist skill levels into specialist or management positions.
- Maintain competitive edge by upgrading staff's service and sales knowledge to generate increased repeat customers.

## **Training Plan**

Training will be delivered via in-house experts in Class/Lab, E-learning and Computer Based Training. Vendors will also be utilized.

**Business Skills:** Training is proposed for Sales, Customer Service, and Merchandiser occupations.

Training for Sales Staff will improve communication and customer management to reinforce the goal of generating repeat customers. Topics such as Marketing and Sales Techniques, Relationship Building will help staff develop and generate business. Business Writing Skills help to create proposals for complex projects.

Customer Service Staff will be trained on topics such as effective Communication styles and Conflict Resolution to diffuse and solve problems related to orders or purchases.

Merchandisers ensure the Company's website conveys luxury and remains simple to use. Topics such as Business Writing help improve multimedia communication to create sales online.

**Commercial Skills:** Training is proposed for Sales, Customer Service, and Merchandiser staff.

Sales Staff need training to match customers needs with correct products. Product knowledge topics include: Advanced Kitchen and Bath Lighting, Advanced Lamps and Light Sources, Advanced Recessed and Track Lighting, Ceiling Fans, Dimmers, Furniture and accessories, Light Source Fundamentals and Light Source Technology.

Customer Service staff needs Logistics training to better track shipments and resolve customer requests including returns and how to deal with broken or damaged products. Technical Knowledge is required to troubleshoot possible faulty products or to direct the customer to select products that may better meet customers needs.

Merchandisers create web pages and need topics such as Web Site Design, Website Optimization, Website Point of Sale, Online Marketing and Online Publishing skills.

**Computer Skills:** Training is proposed for Sales, Customer Service, and Merchandising Staff. Computer software is constantly changing with new versions becoming more comprehensive and complex in their scope of abilities. Thus, staff needs to update their skills on the latest versions. Additionally, new software such as Net Suite and Salesforce Creative Cloud was recently purchased. The new software was purchased to add chat functions to enhance customer service and sales efforts.

**Continuous Improvement:** Training is proposed for Sales and Customer Service staff. Topics such as Save the Sale and Process Improvement are offered to reduce product returns and increase efficiency and customer satisfaction. Operationally, the company aims to lower product returns and improve sales and return processes overall.

### **Computer-Based Training - Commercial Skills**

While the majority of the training being delivered will be in-house instructor led classroom training, YDesign intends to deliver some training topics as Computer-Based Training (CBT). CBT will be provided for courses that can be taken by employees at their own pace without instructors. CBT methods of training offer the Company additional ways to deliver training at the convenience of the training population. YDesign plans to train 28 Sales Staff to receive an industry recognized Lighting Associate certification from American Lighting Association. The total hours to obtain the certification is 37 hours. Other topics delivered via CBT include Product Knowledge and Light Sourcing Fundamentals.

## **Commitment to Training**

YDesign spends \$190,000 annually on training for its two California facilities. Training includes basic computer skills and orientations, and topics available across occupations in Business Skills, Computer Skills and more.

### ➤ Training Infrastructure

YDesign is ready to begin training in September 2018. The Company has a dedicated training Director and has retained an experienced Subcontractor to assist with project administration. The Company has six internal trainers (3 per site) from the Management team and a lead training coordinator has been identified for each site including Director of Training in Walnut Creek and Sales Operations Specialist at the Sacramento location.

## **Retrainee - Job Creation**

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

YDesign has committed to hiring 10 new employees (Job Number 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into “net new jobs” as a condition of contract.

YDesign’s recent office expansions are estimated at approximately 3,000 square feet in the Sacramento office where the newly hired employees will work.

## **RECOMMENDATION**

Staff recommends approval of this proposal.

## **PRIOR PROJECTS**

The following table summarizes performance by Lumens Light and Living LLC under an ETP Agreement that was completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0393	Sacramento	2/27/2015 to 2/26/2017	\$49,896	\$46,104 (92%)

## **DEVELOPMENT SERVICES**

YDesign retained Sierra Consulting Services, Inc. in El Dorado Hills to assist with development of this proposal for a flat fee of \$7,400.

## **ADMINISTRATIVE SERVICES**

Sierra Consulting Services, Inc. will also perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

## **TRAINING VENDORS**

American Lighting Association of Dallas, Texas, has been retained to provide training for a fee of \$10,725. This vendor will supply Computer Based Commercial Skills training. Other trainers will be identified for ETP record-keeping purposes, as they are retained by YDesign.

**Exhibit B: Menu Curriculum****Class/Lab/E-learning**

8-200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Business Writing
- Communication Styles
- Conflict Resolution
- Creative Marketing
- Customer Demographics
- Customer Relationship Management
- Marketing and Sales Techniques
- Operational Skills
- Project Management and Methodology
- Relationship Building
- Retaining Customers

**COMMERCIAL SKILLS**

- Advanced Kitchen and Bath Lighting
- Advanced Lamps (bulbs) and Light Sources
- Advanced Recessed and Track Lighting
- Ceiling Fans
- Dimmers
- Furniture and Accessories
- Inventory Management
- Light Source Fundamentals
- Light Source Technology
- Logistics
- Online Marketing
- Online Publishing
- Product Knowledge
- Website Optimization
- Website Point of Sale

**COMPUTER SKILLS**

- Convey
- Five9
- Liveperson
- Net Suite
- PIM (Product Information Management)
- Salesforce Creative Cloud
- Website Design

**CONTINUOUS IMPROVEMENT**

- Process Improvement
- Product Return Reduction
- Production Operations and Workflow
- Project Management
- Save the Sale

**CBT Hours**

0 – 37

**COMMERCIAL SKILLS**

- ✚ Product Knowledge – LEDs: 7 hours
- ✚ Product Knowledge – Dimmers: 7 hours
- ✚ Product Knowledge – Furniture: 5 hours
- ✚ Product Knowledge – Accessories: 5 hours
- ✚ Light Source Fundamentals: 5 hours
- ✚ ALA - Lighting Associate #1: Fundamentals of Lighting and Electricity .75 hour
- ✚ ALA - Lighting Associate #2: Introduction to Light Sources .75 hour
- ✚ ALA - Lighting Associate #3: Introduction to Decorative Lighting .75 hour
- ✚ ALA - Lighting Associate #4: Introduction to Recessed Lighting .75 hour
- ✚ ALA - Lighting Associate #5: Introduction to Track Lighting .75 hour
- ✚ ALA - Lighting Associate #6: Introduction to Ceiling Fans .75 hour
- ✚ ALA - Lighting Associate #7: Introduction to Energy Efficient Lighting .75 hour
- ✚ ALA - Lighting Associate #8: Introduction to Outdoor and Landscape Lighting .75 hour
- ✚ ALA - Lighting Associate #9: Introduction to Dimming and Controls .75 hour
- ✚ ALA - Lighting Associate #10: Introduction to Kitchen and Bath Lighting .75 hour

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