PANEL PACKET

AUGUST 2015

STATE OF CALIFORNIA

ETP

EMPLOYMENT

TRAINING PANEL

NOTICE / AGENDA

MEETING TIME/PLACE

Friday, August 28, 2015 at 9:30 a.m.
California Environmental Protection Agency, 1001 I Street
Sierra Hearing Room 2nd Floor
Sacramento, CA 95814
Phone: (916) 327-5640

AGENDA

9:30 a.m.	Call to Order by Chair • Roll Call • Agenda • Minutes	Barry Broad
9:45 a.m.	Report of the Executive Director • Legislative/Budget/Other • Request Motion to Delegate in Event of Loss of Quorum/Action • Request Motion to Adopt Consent Calendar Projects/Action	Stewart Knox
10:00 a.m.	Review and Action on Proposals	Gregg Griffin Diana Torres Creighton Chan Willie Atkinson
11:45 a.m.	Action on New Program: No More Barriers	Maureen Reilly
12:00 p.m.	Public Comments	
12:15 p.m.	Public Meeting Adjourns	

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

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 Other changes may also occur (e.g. withdrawn).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

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

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

REVIEW AND ACTION ON PROPOSALS

These funding proposals are listed by Regional Offices and do not reflect the actual order of presentation. They will be considered by the Panel in accordance with a Table of Contents to be published on the ETP website no later than Monday, August 24, 2015 although the Panel may still change the order at the meeting.

North Hollywood Regional Office

American International Industries, Inc. ---------- $306,684
El Camino Community College District, Center for Applied Competitive Technologies (AB118) ---------- $488,796
Pacific Imaging Management, LLC dba Radiology Associates ---------- $151,068
Pandora Media, Inc. ---------- $249,600
Riviera, Inc. dba The Enterprise U (Amendment) ---------- $205,300
Studio Arts, Ltd. ---------- $899,608

San Diego Regional Office

Fender Musical Instruments Corporation ---------- $504,720
Hyundai Capital America ---------- $514,800
Taylor-Listug, Inc. dba Taylor Guitars ---------- $428,440
Ventura Foods, LLC ---------- $324,000

San Francisco Bay Area Regional Office

Alameda County Electrical Industry Apprenticeship and Training Trust ---------- $492,740
Bay Area Counties Roofing and Waterproofing Industry Apprenticeship Training Fund ---------- $299,250
BioMarin Pharmaceutical Inc. ---------- $843,300
Cepheid ---------- $569,640
San Francisco Electrical Industry Apprenticeship and Training Trust ---------- $670,400
Santa Clara County Electrical Joint Apprenticeship and Training Trust ---------- $557,600
State Building & Construction Trades Council of California ---------- $639,720
The Corporation for Manufacturing Excellence ---------- $949,912
Triage Consulting Group ---------- $473,540

Sacramento Regional Office

Carpenters Training Committee for Northern California ---------- $949,902
ProTransport-1, LLC ---------- $528,450

PROPOSALS APPROVED
BY DELEGATION ORDER FOR 7/15/2015 – 08/18/2015

≤ $100,000	Approved Date	Approved Amount
North Hollywood Regional Office		
Alhambra Hospital Medical Center	08/05/15	$99,792
Economic Development Collaborative – Ventura County	08/17/15	$99,916
Golden Eagle Manufacturing	07/20/15	$12,168
Integrated Media Technologies, Inc.	08/17/15	$49,504
MBK Enterprises dba MBK Tape Solutions	07/20/15	$49,920
San Diego Regional Office		
Associated Microbreweries, Inc. dba Karl Strauss Brewing Company	07/21/15	$52,380
Wright Ford Young & Co., Certified Public Accountants and Consultants, Inc.	08/17/15	$41,272
San Francisco Bay Area Regional Office		
Arrow Sign Co.	08/17/15	$12,688
Source One Cable Technology, Inc.	07/21/15	$49,140
West Communication Service, Inc. dba Communication Service Corporation	07/30/15	$5,772
Wolfe Video, LLC	07/20/15	$19,500
Sacramento Regional Office		
Booth Ranches LLC	07/31/15	$49,920
California Health Sciences University, LLC	08/17/15	$9,548
Eminence Healthcare, Inc.	07/27/15	$40,128
Granville Homes, Inc.	08/13/15	$38,532
Mann, Urrutia, Nelson CPA's & Associates, LLP	07/21/15	$26,158
Maas Energy Works, Inc. (AB118)	07/28/15	$15,600
Monster City Studios	08/18/15	$15,600
Platinum Engineering Solution Inc.	07/20/15	$8,294
R.S.S.E., Inc.	08/05/15	$12,760
School Innovations & Achievement	07/30/15	$48,048

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R.S.S.E., Inc.
School Innovations & Achievement
Source One Cable Technology, Inc.
West Communication Service, Inc. dba Communication Service Corporation
Wolfe Video, LLC
Wright Ford Young & Co., Certified Public Accountants and Consultants, Inc.

State of California

M e m o r a n d u m

To: Panel Members

Date August 28, 2015

From: Stewart Knox
Executive Director

File: Panel Memo Doc.

Subject: **Directions to Meeting Site**

The Employment Training Panel will meet on FRIDAY, **August 28, 2015 at 9:30 a.m.**

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

Directions to the California Environmental Protection Agency - Sierra Hearing Room

From Sacramento International Airport:

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

From San Francisco

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

M e m o r a n d u m

To: Panel Members

Date August 28, 2015

From: Stewart Knox
Executive Director

File: Mtg. Site Memo

Subject: **Future Meeting Sites**

September 25, 2015	**California Environmental Protection Agency** **Time: 09:30 AM** **Coastal Hearing Room, 2nd Floor** **1001 I Street** **Sacramento, CA 95814**
October 23, 2015	**New City Hall – Sacramento** **Time: 09:30 AM** **Council Chambers, Room 1103, 1st Floor** **915 I Street** **Sacramento, CA 95814**
December 4, 2015	**New City Hall – Sacramento** **Time: 09:30 AM** **Council Chambers, Room 1103, 1st Floor** **915 I Street** **Sacramento, CA 95814**
January 22, 2016	**California Environmental Protection Agency** **Time: 09:30 AM** **Sierra Hearing Room, 2nd Floor** **1001 I Street** **Sacramento, CA 95814**

STATE OF CALIFORNIA
EMPLOYMENT TRAINING PANEL MEETING
California Environmental Protection Agency
1001 I Street
Coastal Hearing Room – 2nd Floor
Sacramento, CA 95814
July 24, 2015

PANEL MEMBERS

Barry Broad
Chair

Janice Roberts
Vice-Chair

Gloria Bell
Member

Sonia Fernandez
Member

Leslie McBride
Ex-Officio Member

Edward Rendon
Member

Sam Rodriguez
Member

Executive Staff

Stewart Knox
Executive Director

Maureen Reilly
General Counsel

STATE OF CALIFORNIA
EMPLOYMENT TRAINING PANEL MEETING
California Environmental Protection Agency
1001 I Street
Coastal Hearing Room – 2nd Floor
Sacramento, CA 95814
July 24, 2015

I. PUBLIC PANEL MEETING CALL TO ORDER

Chairman Broad called the meeting to order at 9:37 a.m.

II. ROLL CALL

Present
Gloria Bell
Barry Broad
Sonia Fernandez
Leslie McBride
Edward Rendon
Janice Roberts
Sam Rodriguez

Executive Staff Present
Stewart Knox, Executive Director

III. AGENDA

Chairman Broad asked for a motion to approve the Agenda.

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

Motion carried, 7 – 0.

IV. MINUTES

ACTION: Ms. Roberts moved and Ms. McBride seconded the motion that the Panel approve the Minutes from the June 24, 2015 meeting.

Motion carried, 7 - 0.

V. REPORT OF THE EXECUTIVE DIRECTOR

Stewart Knox, Executive Director said, good morning Panel members, applicants, and stakeholders. Following the Panel meeting in June, we have a much larger Panel meeting this month with over $13M in projects and $521,000 in Delegation Orders to start off the Fiscal Year (FY). We will also update you on the opening of the pool of funds for FY 2015/16 which includes this month.

Today we have a mix of single employers and multiple employer projects. Regional Office Managers Diana Torres, Greg Griffin, Creighton Chan, and Willie Atkinson are here today to present those proposals.

Regarding the budget for Alternative Fuels, this year we are starting off with $2.8M. Should the Panel approve all the projects today, which is over $1.3M, we will have about $1.5M remaining for this FY. The $2M of drought funding has been completely encumbered and we were not allocated new funds in this new FY.

In regards to CORE funding, to date, the Panel will consider an additional $13.7M with another $521,949 approved by the Delegation Order. Should the Panel approve all the projects today, the Employment Training Panel (ETP) will have approximately $77M for the remainder of the FY. After June's meeting all of FY 2014/15 has been encumbered and ready to go. As you recall, we amended this year's allocations to bring down liabilities for this FY, giving us the ability to have more funds available for FY 2015/16. We will have an updated report for you on our August Panel meeting.

Under Delegation Order, Small Business was capped at $50,000 and other proposals were capped at $100,000 to be approved by the Executive Director on a continuous flow basis, and as of today we have approved 11 projects totaling over $521,000 for this FY.

For the FY 2015/16 program funding, to date we have approximately 403 applications submitted during the first and second round, with a value just under $70M; this is round one and two for all fund streams. The number of applications we have received this year is slightly higher compared to last year, which was about 398. Financially we look very strong. The beginning of the year is always the big push and most of the larger projects are in.

In regards to the Fund Status Report for the FY 2015/16, the ETP fund is at $76.2M. The projected contracting capacity is $90.6M; 38% encumbrance level. We will bring you an updated version of the closeout at the next Panel meeting. This will likely change since we have moved the funds into the prior year's contract liabilities, bringing that figure higher into the next year. We will then increase the amount of funds we have available for the FY 2015/16, for now we are leaving it as is until the closeout is complete.

Potential funding of applications and demands by contracts are still in the regional offices. Single Employer Contracts request is at $40M; $45M in allocations. Multiple Employer Contracts requests are about $13M in demand; $20M in allocations. Small Business is at $3.9M in demand; $6.5M in allocations. Critical Proposals is at $2.1M in demand; $8M in allocations. Apprenticeships are at $7M in demand; $12M in allocations. Overall demand is approximately $70M.

Regarding the number of projects remaining in the regional offices today: Single Employers 102, MECS 21, Small Business 90, Critical Proposals 6, Apprenticeship 13; total of 232. AAU by category: Single Employers 78, MECS 17, Small Business 57, Critical Proposals 2, Apprenticeship 16; total of 170. Staff is working hard on pushing those projects out into the regional offices; about 68% of the projects have been assigned to the regional offices to date. If you haven't been contacted by our staff, I'm sure you will be hearing from them shortly.

Mr. Knox said, as I had mentioned in our previous meeting, we will send out a report of last year's audits on 12 different contracts in the last 6 months to our Panel members. We will send out the reports via email at the end of next week. If you have any questions regarding this matter, you can email me or give me a call.

Regarding the legislative update, AB 1270, California Workforce Innovation and Opportunity Act was approved by the Governor on July 14, 2015, and filed with the Secretary of State the same day and chaptered (Chapter 94, Statutes of 2015). In summary, AB 1270 updates statutory references to the Workforce Investment Act of 1998 to instead refer to the Workforce Innovation and Opportunity Act of 2014 and makes other related conforming changes. Further, it revises legislative findings with regard to the act, revises the definitions of terms used within the act, and renames the California Workforce Investment Board the California Workforce Development Board.

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

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

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

Motion carried, 7 – 0.

VII. MOTION TO ADOPT CONSENT CALENDAR PROJECTS

Mr. Broad asked for a motion to adopt Consent Calendar Items #1 through #7.

Bay Alarm Company	$156,000
Burr Pilger Mayer, Inc.	$211,900
Fresno Surgery Center, LP dba Fresno Surgical Hospital	$229,920
Medway Plastics Corporation	$160,560
Simpson Strong-Tie Company Inc.	$136,800
Sunrise Medical (US) LLC	$280,350
Sysco Los Angeles, Inc.	$255,600

ACTION Ms. Roberts moved and Ms. McBride seconded the approval of Consent Calendar Items #1 through #7.

Motion carried, 7 – 0.

VIII. REVIEW AND ACTIONS ON PROPOSALS

Single Employer Proposals

International Rectifier Corporation

Diana Torres, Regional Office Manager of San Diego Regional Office, presented a Proposal for International Rectifier Corporation (IRC) in the amount of $402,886. Founded in 1947, IRC has manufactured and designed power management semiconductors since it first ventured in the production of Selenium rectifiers. This is IRC's fourth ETP Agreement and includes a 15% substantial contribution applied to Job #2. Funding was received in excess of $250,000 within the last five years at the Temecula facility. Ms. Torres noted that there was an error on the memorandum; it should state the Temecula facility not El Segundo.

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

ACTION: Ms. Roberts moved and Ms. McBride seconded the approval of the Proposal for International Rectifier Corporation in the amount of $402,886.

Motion carried, 7 – 0.

Karl Storz Endoscopy-America, Inc.

Ms. Torres presented a Proposal for Karl Storz Endoscopy-America, Inc. (Karl-Storz) in the amount of $508,848. Karl Storz is a global manufacturer and distributor of endoscopes, medical instruments, and devices operating in over 40 countries. Karl Storz consist of manufacturing and research and development (R&D) entities in the United States and Europe, as well as distribution companies around the world. Ms. Torres noted an error on page 1 of 7. The proposal states that Karl Storz Endoscopy has Medical Skills Training in their curriculum, which they don't; they are an actual manufacturer not a healthcare facility.

Ms. Torres introduces Sken Huang, Corporate Controller.

ACTION: Ms. Roberts moved and Ms. McBride seconded the approval of the Proposal for Karl Storz Endoscopy-America, Inc. in the amount of $508,848.

Motion carried, 7 – 0.

Meggitt (North Hollywood), Inc.

Ms. Torres presented a Proposal for Meggitt (North Hollywood), Inc. (Meggitt) in the amount of $749,372. This proposal for Meggitt has been designated a Critical Proposal by the Governor's Office of Business and Economic Development (GO-Biz) based on Meggitt's planned business expansion and commitment to adding jobs in California.

Ms. Torres introduced Victoria Lewis, Human Resources Manager.

Ms. Roberts said, the cost per trainee seem a bit high. You don't have any advanced technology that I see in this proposal. Ms. Torres said, the proposal is in accordance to the rate of $18 for the class lab. The continuous improvement is the bulk of the training. If you look on page 4 of 4, it's 90% of the training and the manufacturing skill is 5%.

Mr. Rodriguez said, they have 320 workers on the plant and over 200 will be training, is their training integrated to their ongoing training because their device is designed for the defense industry? Ms. Torres said yes.

Ms. Torres asked, for continuous improvement that's quite a bit of hours, can you address that? Ms. Lewis said, we have a new program that was implemented at Meggitt Corporate wide and worldwide called Meggitt Production Systems. It's a program that implements Lean initiatives into the organization. We hired a continuous improvement department and the program affects the whole organization. There is a daily layered accountability which all the employees are involved at different levels and it helps with the productivity within the organization. Companywide there are initiatives to train for continuous improvement starting next week. It does affect the organization companywide.

Ms. Roberts said, from a training perspective you get 10% of their hours per year just devoted to training for 250 individuals, it seems like a high amount. I would encourage you to keep an eye on your hours.

Gene Heardwood, Representative, United Auto Workers, Aerospace Agriculture Implement Workers of America (UAW) said, I just want to say the UAW fully supports this proposal. Most of you know the dynamics of aerospace industry is changing. The skill upgrades are off the charts and we need to keep our workers up to speed on their training skills.

ACTION: Mr. Rodriguez moved and Ms. McBride seconded the approval of the Proposal for Meggitt (Hollywood), Inc. in the amount of $749,372.

Motion carried, 6 – 0.
(Mr. Rendon stepped away from the dais during voting.)

Woodward HRT, Inc.

Ms. Torres presented a Proposal for Woodward HRT, Inc. (Woodward HRT) in the amount of $337,590. The Governor's Office of Business and Economic Development (Go-BIZ) has designated Woodward HRT as a "Critical Proposal". Woodward HRT is expanding production due to a significant increase in new product development and equipment. ETP funding will enable the Company to provide training for workers on this new equipment.

Ms. Torres introduced Art Martinez, Human Resource Manager.

ACTION: Ms. Roberts moved and Ms. McBride seconded the approval of the Proposal for Woodward HRT, Inc. in the amount of $337,590.

Motion carried, 7 – 0.

A. Teichert & Son, Inc.

Willie Atkinson, Manager of the Sacramento Regional Office presented a Proposal for A. Teichert & Son, Inc. (Teichert) in the amount of $329,076. Teichert is a construction company that builds infrastructure such as freeways, commercial and industrial site works, parks and airports.

Mr. Atkinson introduced Mark Ingram, Vice President of Strategic Services and Steve Duscha, Duscha Advisories.

Mr. Broad asked, are you at a level of employment that you were prior to the recession at this point? Mr. Ingram said, no. Mr. Broad said, the Panel packet indicates that you have 1,300 employees, how many employees did you have before? Mr. Ingram said we were in the neighborhood of roughly 4,000 employees. We were hit hard by the recession.

Mr. Rodriguez said, you mentioned the recession and increased competition; can you share briefly what was going on in the marketplace? In terms of the competition, are they local, out-of-state, or international? Mr. Ingram said, mostly local and non-union. For example, in our ready-mix division, in the private-sector, we compete with non-union. Mr. Rodriguez asked, is labor force coming locally for these companies or are they coming from different places? Mr. Ingram said, they're mostly regional; from the Northern California, farther down in the Valley, and Bay area competitors coming into our area. Mr. Rodriguez asked, is it expertise or is it price point in terms of competition? Mr. Ingram said, its price point, and from our perspective, it's an opportunity for us to develop the skills and the informational infrastructure to compete with the other organizations. Mr. Rodriguez said, thank you.

ACTION: Mr. Rodriguez moved and Ms. Fernandez seconded the approval of the proposal for A. Teichert & Son, Inc. in the amount of $329,076.

Motion carried, 7 – 0.

ConAgra Foods, Inc.

Mr. Atkinson presented a Proposal for ConAgra Foods, Inc. (ConAgra) in the amount of $304,000. This is the fourth ETP-funded Agreement with ConAgra; however, this is the first Agreement for the ConAgra facility in Visalia. The Visalia facility produces pretzels and snack mixes and will be the only participating location in this proposal.

Mr. Atkinson introduced Ed Desrosiers, Plant Manager and Mike Jester, Consultant.

Ms. Bell said, how will you find 40 individuals in Visalia, what is your recruiting strategy? Mr. Desrosiers said, primarily its applications through the temporary agency service, most of them are conversions from temporary to permanent positions. Out of the 160, 120 were temporary to permanent conversions. Ms. Bell said, so you do temporary to hire process; what is your probation period? Mr. Desrosiers said, yes; 90 days. Ms. Bell asked, upon 90 days, do they receive benefits? Mr. Desrosiers said, yes.

ACTION: Ms. Roberts moved and Ms. Bell seconded the approval of the proposal for ConAgra Foods, Inc. in the amount of $304,000.

Motion carried, 7 – 0.

Diamond Foods, Inc.

Mr. Atkinson presented a Proposal for Diamond Foods, Inc. (Diamond Foods) in the amount of $434,484. Diamond Foods produces premiums snack foods and culinary nut products. Diamond Foods products are distributed globally to stores where groceries, snacks and nuts are sold. This will be Diamond Foods' first ETP agreement and will only include the production facility located in Stockton.

Mr. Atkinson said that the current proposal does not contain a job creation component. However, Diamond Foods has a program where they actively recruit veterans and attend job fairs.

Mr. Atkinson introduced Torrey Harding, Directors of Operations and Angela Jones, Consultant TGII.

Mr. Harding said, I would like to elaborate on the veteran recruiting that we do. We hire our technicians through our "rind", which is a firm that takes our armed force veterans and sets up career fairs. There is some recruiting that takes place at the career fair with the local Air Force bases; we recruit from those bases as well.

Mr. Atkinson said, it was during the Panel preparation call when we found this out. The project analyst will connect with Diamond Foods and decide if they want to add a veteran's component job number to the Agreement. Mr. Broad asked, is that something that would change the economics of the proposal? Mr. Atkinson said, potentially. We will analyze that and see if we need to come back to the Panel for modification.

Mr. Rodriguez asked, what are the productive laboratory and its ratio in terms of seasonal job versus full time employment at the facility? Mr. Harding said, we normally run about 450-470 full time employees. We have about 300 seasonal employees between September and November, and we have a pool of seasonal employees that return every single year; they come and go at the end of each season.

Mr. Rodriguez asked, can you give us a brief overview of the productive lab? Mr. Harding said, we typically conduct classroom and floor training. Our ratio is normally 1 to 3. When we acquire new technology, equipment, and baggers, we have a trainer assisting two or three people in each shift.

ACTION: Mr. Rodriguez moved and Mr. Rendon seconded the approval of the proposal for Diamond Foods, Inc. in the amount of $434,484.

Motion carried, 7 – 0.

<u>Multiple Employer Contracts</u>

California Labor Federation, AFL-CIO

Gregg Griffin, Manager of the North Hollywood Regional Office presented a Proposal for California Labor Federation, AFL-CIO (CalFED) in the amount of $1,341,300. CalFED is an organization comprised of more than1,200 AFL-CIO unions, with more than 2 million represented employees working in the manufacturing, retail, construction, hospitality, public sector, health care, entertainment, and transit industries.

Mr. Griffin introduced John Brauer, Executive Director of Workforce and Economic Development at California Labor Federation.

ACTION: Mr. Rendon moved and there was a second for approval of the Proposal for California Labor Federation, AFL-CIO in the amount of $1,341,300.

Motion carried, 7 – 0.

California Manufacturing Technology Consulting

Mr. Griffin presented a Proposal for California Manufacturing Technology Consulting (CMTC) in the amount of $1,199,745. This will be the 16th Agreement between ETP and CMTC. CMTC was established in 1992 as a private non-profit corporation, affiliated with the US Department of Commerce, National Institute of Standards and Technology, and Hollings Manufacturing Extension Partnership to assist small and medium-sized manufacturers in California to improve operational efficiencies and global competitiveness. Its mission is to create solutions for manufacturing growth and profitability supporting a thriving manufacturing sector in the State of California.

Mr. Griffin introduced Cheryl Slobodian, Representative and Jim Watson, President.

ACTION: Ms. Roberts moved and Ms. McBride seconded the approval of the proposal for California Manufacturing Technology Consulting in the amount of $1,199,745.

Motion carried, 7 – 0.

Employers Group

Mr. Griffin presented a Proposal for Employers Group in the amount of $535,788. This will be the tenth Agreement between ETP and Employers Group. The Employers Group is a non-profit trade association dedicated to Human Resources (HR) management.

Mr. Griffin introduced Jeffrey Hull, Senior Director.

ACTION: Ms. Roberts moved and Ms. McBride seconded the approval of the proposal for Employers Group in the amount of $535,788.

Motion carried, 7 -0.

Glendale Community College Professional Development Center

Mr. Griffin presented a Proposal for Glendale Community College Professional Development Center (GCC) in the amount of $826,270. This will be the 37th Agreement between ETP and GCC. GCC provides customized, job-specific training for business and workers through its Professional Development Center. GCC has trained more than 36,000 workers from 4,800 Southern California employers during its 30-year history of funding through ETP, of which 82% were for small business employers and 96% were for Panel-recognized priority industries.

Mr. Griffin introduced Kim Holland, Director.

ACTION: Ms. Roberts moved and Ms. Bell seconded the approval of the proposal for Glendale Community College Professional Development Center in the amount of $826,270.

Motion carried, 7 – 0.

NTMA Training Centers of Southern California

Mr. Griffin presented a Proposal for NTMA Training Centers of Southern California (NTMA) in the amount of $1,199,952. NTMA is the training arm of the machining industry in Southern California. NTMA is eligible for ETP funding as a private training agency and the core participating employers will qualify as manufacturers facing out-of-state competition. This core group of employers represents at least 80% of the requested funding. Approximately 90% of the proposed training will be delivered at NTMA's training facilities and the remaining 2% will be at employer worksites.

Mr. Griffin introduced Norma Meza, ETP Coordinator and Michael Kerwin, President, NTMA Training Centers.

Ms. Roberts said, your average cost per training seems high. Ms. Meza said the total number of hours in our program is actually 905 hours; ETP picks up the latter portion of 260 hours. Trainees have to attend the program and then they are placed.

ACTION: Ms. McBride moved and Mr. Rendon seconded the approval of the proposal for NTMA Training Centers of Southern California in the amount of $1,199,952.

Motion carried, 7 – 0.

San Bernardino Community College District

Mr. Griffin presented a Proposal for San Bernardino Community College District (SBCCD) in the amount of $949,962. This will be the fifth Agreement between ETP and SBCCD.

Mr. Griffin introduced Robert Levesque, Director of Workforce Development.

ACTION: Ms. Roberts moved and Mr. Rendon seconded the approval of the proposal for San Bernardino Community College District in the amount of $949,962.

Motion carried, 7 – 0.

South Bay Workforce Investment Board

Mr. Griffin presented a Proposal for South Bay Workforce Investment Board (SBWIB) in the amount of $199,050. SBWIB is requesting ETP funds to train and place unemployed Veterans who have served on active full-time duty in the Armed Forces and were honorably discharged and 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. These trainees meet eligibility standards under the Panel Veterans Pilot Program.

Mr. Griffin introduced Cyd Spikes, Special Projects Development Manager, and Kelly Knox, Occupational Safety Councils of America.

ACTION: Mr. Rendon moved and Ms. Roberts seconded the approval of the proposal for South Bay Workforce Investment Board in the amount of $199,050.

Motion carried, 7 – 0.

Workforce Development Corporation of Southeast Los Angeles County, Inc. dba Southeast Los Angeles County Workforce Investment Board

Mr. Griffin presented a Proposal for Workforce Development Corporation of Southeast Los Angeles County, Inc. dba Southeast Los Angeles County Workforce Investment Board (SELACO WIB) in the amount of $949,522. SELACO WIB is a nonprofit organization formed pursuant to the federal workforce investment act of 1998, section 121(c). SELACO WIB's Business Service Unit provides services to an estimated 3,100 businesses mainly located in the Southeast Los Angeles and Orange County areas.

Mr. Griffin introduced Larry Lee, Business Services Manager, and Kay Ford, Fund Development Manager.

ACTION: Ms. Roberts moved and Ms. Bell seconded the approval of the proposal for Workforce Development Corporation of Southeast Los Angeles County, Inc. dba Southeast Los Angeles County Workforce Investment Board in the amount of $949,522.

Motion carried, 7 – 0.

City and County of San Francisco

Creighton Chan, Manager of the Foster City Regional Office presented a Proposal for the City and County of San Francisco (City of SF) in the amount of $514,476. City of SF is a joint powers entity governed by the city mayor and County Board of Supervisors. The City of SF's Office of Economic and Workforce Development (OEWD) operates Workforce Investment Act (WIA) programs in the city and county. This proposal will fund classroom/laboratory training at the CityBuild Academy, a program created by OEWD in partnership with the construction trade unions, the City College of San Francisco, the San Francisco Construction Trades Council, and community-based organizations.

Mr. Chan introduced Marc Majors, CityBuild Academy Manager, and Steve Duscha, Duscha Advisories.

ACTION Ms. Roberts moved and Ms. McBride seconded the approval of the proposal for the City and County of San Francisco in the amount of $514,476.

Motion carried, 7 – 0.

Joint Apprenticeship and Training Committee of the Plumbing and Pipefitting Industry of San Mateo County

Mr. Chan presented a Proposal for Joint Apprenticeship and Training Committee of the Plumbing and Pipefitting Industry of San Mateo County (Plumbers JATC San Mateo) in the amount of $386,124. For over 100 years, Plumbers JATC San Mateo has provided qualified workers to perform plumbing, pipefitting and HVAC (heating, ventilation and air-conditioning) services for employers throughout San Mateo County. This will be the first ETP Agreement for the Plumbers JATC San Mateo County.

Mr. Chan introduced Robert Kay, Training Director and Jan Borunda, Project Coordinator at California Labor Federation.

ACTION Ms. Roberts moved and Mr. Rodriguez seconded the approval of the proposal for Joint Apprenticeship and Training Committee of the Plumbing and Pipefitting Industry of San Mateo County in the amount of $386,124.

Motion carried, 7 – 0.

Pipe Trades Joint Apprenticeship and Training Committee of Santa Clara and San Benito Counties

Mr. Chan presented a Proposal for Pipe Trades Joint Apprenticeship and Training Committee of Santa Clara and San Benito Counties in the amount of $642,410. The Pipe Trades JATC Santa Clara opened the Lloyd E. Williams Pipe Trades Training Center in 1961.

Mr. Chan introduced Carl Cimini, Training Director, and Jan Borunda, California Labor Federation.

ACTION: Ms. Roberts moved and Mr. Rendon seconded the approval of the proposal for Pipe Trades Joint Apprenticeship and Training Committee of Santa Clara and San Benito Counties in the amount of $642,410.

Motion carried, 7 – 0.

Butte-Glenn Community College District

Mr. Atkinson presented a Proposal for Butte-Glenn Community College District (Butte) in the amount of $404,493. Butte, located in Oroville was founded in 1968. The institution is a two-year community college and is accredited by the Accrediting Commission for Community Junior-Colleges of the Western Association of Schools and Colleges.

Butte currently has an alternative funding under the drought program which was approved last month. Butte has incorporated the Feather River ET-15 0405 Agreement which was $106,000. They no longer have a signatory so Butte acted as a host; that's where the collaboration from CITD came from. If you look at the prior performance, there is a 70% threshold. The way that we figured out the funding amount for Butte under this Agreement, we looked at their needs and the documentation they submitted to the analyst. The request supported the $435,000, which was the original amount. We subtracted 7% to get the current funding amount because they were under that 70% threshold. If they hit the 70% they are allowed to come back and request whatever amount they can justify.

The $404,000 does not include the $106,000 from Feather River. Butte itself has shown a need for $435,000. After we went to print, we spoke with the contractor and they are actually working with Victory Village out of Oroville which assists veterans in job placement. They're also working with the job placement on the campus. We will be meeting with them and see if we can incorporate.

Annie Rafferty, Director of Contract Education Training and Development said, thank you for having us. Ms. Rafferty introduced Linda Zorn, Executive Director, Butte College, and Bryan Boyer, Project Coordinator.

Mr. Broad asked, when are you planning to start the drought project? Ms. Rafferty said, we have a collaboration with CITD that have plans in place to demonstrate the activities for the training on the contract; those plans are already in place and moving forward with the classes.

Mr. Broad asked, has the class already started? Ms. Rafferty said, they are scheduled to begin in September. We have an existing relationship with Cal Water, Butte County, and other agencies that are heavily involved with our local companies that are facing drought challenges in the agriculture area. We have meetings to talk about those plans so that we can see how ETP can support those efforts, and I'm encouraged that we will complete that contract at a 100% with those opportunities.

Mr. Broad said, that's moving forward and are students enrolled? Ms. Rafferty said, yes. Mr. Broad said, I don't want to keep adding to the projects, and then they don't pan out. Let's talk about your past performance, what happened that you only earned 63%? Ms. Rafferty said we were on a path with all of our training delivery that would show we would have met performance. With the new modifications that the board has approved, lightening the hours required, we were on our path where we had 688 participants who received training of between eight and 23 hours on that contract. I'm confident working with the employers that we can meet the eight hour minimum, with some of those particular short-term trainings similar to what San Bernardino and Glendale had shared. We have very targeted programs that have short terms. The new minimum requirements that are included on the contract will prepare us to be able to achieve those numbers.

Mr. Broad asked, are students going to be enrolled all at the same time, or will they be spaced out over a course of a year? Ms. Rafferty said, each employer's training plan is going to be based on its own timeline. The 27 employers that are included in the application will be planning their training aligned with their delivery plans. There will be groups that will be moving forward; in total there are about 42 companies that we have targeted to outreach and to do the same type of comprehensive training plan with those organizations. Mr. Broad asked, how much of this $400,000 is lined up for employers? Ms. Rafferty said, 100%. Mr. Broad asked, so you have all the employers lined up and committed now? Ms. Rafferty said, we have 27 companies that are included in the proposal that are interested in working with us to map out those plans and schedule the training.

Mr. Broad said, my inclination in a situation like this where there isn't very good previous performance is to right-size. I understand the rightsizing, but they were very generous. Given how we've right-sized other projects based on their previous performance, that's what we've typically done in the past if you've earned $180,000 to $200,000. I would like to see what the other Panel members think. What we've sort of said is, we will approve half, and then you can return and ask for a modification when you are ready and have earned the first half, so there's accountability. I'm inclined to go with that unless somebody gives me a really good argument.

Mr. Atkinson said, Butte originally asked for $800,000 and it was substantiated with documentation; they submitted training plans and certification. So what we looked at was what they originally asked for, and substantiate $100,000; then we had a conversation around half of that. We met several times and we cut it in half and right-sized the project. Mr. Broad said, so you rightsized half of their request, not based on their earnings from the previous performance. Mr. Atkinson said we looked at their earnings from their previous performance. Staff looked at their look at their previous performance as a starting point, then they submitted documentation to substantiate $800,000 worth of training and then we right-sized that amount.

Mr. Broad said I'm concerned about their capacity to actually deliver the training on this project and the other project they've inherited from Feather River. There's a lot going on here. The drought project needs to be completed first, and then this second project needs to be completed as well. I'm inclined to approve half of this, and then have you come back for an amendment to get the other half when you have shown performance and have completed the drought project.

Ms. Roberts said, so you've hired Mr. Boyer to assist you since you've had a different type of infrastructure than you had before. Ms. Rafferty said, yes. We've experienced a great deal learning from our first contract. First, the infrastructure that it takes to support effectively and easily administer a contract with an employer; second, we were very conservative on our first contract. We partnered with eight organizations to learn the process and understand it. We had a good experience with those eight employers. This current contract reflects 27 companies that we had conversations with; we are in motion with those employers. So if we move forward with only half, that would mean we would have to back up some of those plans, and I'm concerned about the message that we would be sending out about our ability. Third, for a multiple employer contractor, we're having a great success. The experience and relationship with ETP has really been welcomed with our partnership, in the north state, and we are the only community college that has started down that route. On behalf of our partnership, I would also like to honor that as well.

Mr. Broad said, I'm sort of convince by this, but if you come back another time and you don't perform on this project, it's not going to be all that fun. In many circumstances with this situation, we would cut it in half and have you come back, but it creates a lot of discipline in the process. You've hired a new person, you're doing something different, you have more employers, and it's still pretty untested. I will back off with a stern warning. Ms. Rafferty said, that is well received.

Ms. Fernandez said I'm not currently comfortable funding the current amount. I would be more comfortable cutting the amount in half until they have shown performance. I'm not going to approve this otherwise.

Mr. Rodriguez asked, when did you hire Mr. Boyer? Mr. Boyer said, about a month ago. I have an extensive workforce development experience. Mr. Rodriguez asked, have you had time to assess prior systems and why it was unsuccessful previously? Mr. Boyer said, (inaudible) didn't have a lot of experience necessarily as much as I have working with employers and government contracts and grants. Mr. Rodriguez said, so it's just the lack of experience, and now they're going to play with the $800,000? Mr. Boyer said, he mentioned

the minimum training hours requirement was 24 hours. There were many participants who received training less than 24 hours for which we can take credit for. Now that you've adjusted that, we are much more confident.

Mr. Rodriguez asked, was the modification submitted to staff? Mr. Atkinson said, that was submitted to staff prior to the change in policy where the large employer minimum hours were 24. ETP decided that there will not be a retroactive date for the 8 to 24 hours. That's why the modification did not move forward and was not approved. When we look at the performance on a two year contract, we look at the overall performance. We do not break it down into periods or segments. Under this Agreement, the first year was the learning curve. The majority of their training came into the second year after they figured out how ETP worked. If they would've had the learning curve earlier on, then they would have been over the 70%, so we took that as a factor. The majority of the training took place during the second year. It wasn't evenly distributed over the term of the agreement. They were figuring out the curve, and then once they figured it out in the second year, training progress on a fast motion.

Ms. Rafferty said, the learning curve was a representation of our partnered learning curve. There were some retirements and transitions that occurred with our analyst and our staff. At one point we waited for months for a response on certain actions that we wanted to take or didn't want to take and then learned later that we could have taken it. There were things that we were able to do and so during that first year we were conservative in our action because we may have been waiting for a response. There were some transitions that took place during the first year that impacted our performance.

Mr. Rodriguez asked, hypothetically, what's the downfall if we were to approve just half of the funding? Mr. Broad said, we're not reducing the amount of the contract, what we're saying is come back for the other half for an amendment. Ms. Rafferty said, I'm thinking about the timeline; how quickly that would be. If I made a commitment to an employer, how quickly are we able to fiscally make that addendum to honor those employers? The conversations that I have in place with the employers, how would that impact the flow of the scheduling of the training that we have with them, based on the ability internally with ETP to be able to make those adjustments and us coming back here before the Panel. I'm processing the timeline of what that would do to impact our existing conversations. Mr. Rodriguez said, it is an administrative process that you're going through in your head. There's a benefit to that, engaging your employers, and basically advising them that ETP has made the decision in terms of cooperation from your employers. Ms. Rafferty said, the employers can see that we're putting things on hold. That's what I'm mindful of when we would start because we have multiple employers all starting in different phases all at once. I would have to figure out who we would hold back. Mr. Rodriguez said, keep in mind you haven't started the contract on the drought project. Ms. Rafferty said, we received an approval last month and have started that project.

Mr. Broad said, it's up to the Panel to either make a motion to approve as proposed or modify.

ACTION: Ms. Roberts moved and Ms. McBride seconded the approval of the proposal for Butte-Glenn Community College District in the amount of $404,493.

Motion carried, 4 – 2 – 1 (Ms. Bell and Ms. Fernandez opposed; Mr. Rodriguez abstained.)

California Tooling and Machining Apprenticeship Association.

Mr. Atkinson presented a Proposal for California Tooling and Machining Apprenticeship Association (CTMAA) in the amount of $80,080. The CTMAA began operations 23 years ago as a chapter of the National Tooling & Machining Association. Seven years ago, CTMAA was formed as a stand-alone trade association, doing business in California as a non-profit corporation headquartered in Petaluma. Its primary function is to train in the next generation of machinists in California.

Mr. Atkinson introduced Mike Snead, Sierra Consulting and Dick Herman, Secretary of the Board of CTMAA.

ACTION: Ms. Roberts moved and Ms. Bell seconded the approval of the proposal for California Tooling and Machining Apprenticeship Association in the amount of $80,080.

Motion carried, 7 – 0.

IX. Strategic Plan

Mario Maslac, Employment Training Panel, Planning and Research Manager

Mr. Maslac said, good morning Mr. Chairman and Panel members. I would like to provide you with a brief overview of the Fiscal Year 2015/16 Strategic Plan. First I would like to thank the members of the Planning and Research Unit who did an exemplary job of putting the plan together. They are Elisabeth Testa, Tiffany Woodruff, Brian Lytle, Alana Sanchez, Jeff Brooks, John Saunders, John Bohart, and our division chief, Tara Armstrong.

The Strategic Plan has been updated from last year with a few minor revisions. In addition to the ETP vision and mission statement, introduction, overviews and accomplishments, the Strategic Plan also includes an economic overview, details on ETP priority industries, workforce trends, strategic initiatives, strategic alliances, administrative strategies, and goals and objectives.

ETP's priority industries identified in the Strategic Plan are deemed most vital to the State's economic health and recovery. They are the focus of ETP's marketing efforts and the employers in these industries receive a higher training reimbursement rate. The priority industries identified in the Strategic Plan remain unchanged from the previous FY. They are agriculture, allied healthcare, biotechnology and life sciences, construction, green/clean technology, goods movement and transportation logistics, information technology services, manufacturing, multimedia/entertainment, and technical services.

The Strategic Plan includes information about workforce trends which includes the Workforce Innovation and Opportunity Act (WIOA), employer-based training and on-the-job training, training for special populations like retirees and older workers, veterans, drought victims, and

middle skill workers. The workforce trends section also focuses on sector strategies and partnerships. The plan also covers strategic initiatives including drought relief, healthcare, alternative renewable fuel and vehicle technology program, green technology, career technical education with the focus on manufacturing, allied healthcare, construction, apprenticeship training funded through sponsorship programs with the Joint Apprenticeship Training Committee (JATC) and other program sponsors, training veterans and serving small business.

ETP's strategic alliances include state and local Workforce Investment Boards (WIBS) coordinating with CalFed and State building, and construction trade councils to continue the apprenticeship training pilot program; supporting job creation and retention in concert with partners like Governor's Office of Business and Economic Development (GO-Biz) to develop critical proposals with an emphasis on creating new jobs; revitalizing High Unemployment Areas (HUA) with a focus on rural and agricultural areas such as the Central and Imperial Valleys and other marketing contracts.

Under the Administrative Strategies, this section includes information about the development of the new Employment Training Management System (ETMS), relocating the Central Office, and maximizing funds to ensure best use of ETP's resources. To maximize limited funding, ETP will continue to incrementally encumber training funds to cover the first year costs and mitigate liabilities for the second year; incentivize training for newly-hired employees, apply high earner reductions to repeat contractors, apply substantial contribution reductions, and adjust funding priorities and limitation including project funding caps. The funding caps are subject to revisions by ETP based on adjustments to projected revenue collection of the employment training tax, and other factors. The need for flexibility in setting Funding Caps is an aspect of strategic planning.

Regarding the project caps: single employer $750,000; single employer small business $50,000; Multiple Employer Contract (MEC) $950,000; MECs with small business incentive $1.2M; Apprenticeship Training per program sponsor $450,000; Critical Proposals $900,000. Other limitations: MECs support costs will default to the highest percent (8% for retrain and 12% for new hires) and must justify the need for support costs; MECs (retraining) must have demonstrated participating employer commitment to training; substantial contribution levels will default to the lowest percentage and the Panel has the flexibility to set levels higher on a case-by-case basis; employers earning more than $2M in the last five years pay higher reduction (15%, 30%, 50%). Lowest priorities will include retraining for employees of training agencies, and all training in the adult entertainment industry.

The Strategic Plan has six goals:
1. *Enhancing the Visibility of the ETP Program*. The objectives are: partner with public and private sector, State and local economic and workforce development organizations, including GO-Biz, to identify projects that demonstrate a direct economic impact to the State; partner with public and private stakeholder to increase outreach and raise awareness about the ETP program; educate legislative members and staff on the availability of training funds for their constituencies; continue to work with the Labor and Workforce Development Agency on labor workforce objectives in alignments with the Governor's office.
2. *Target California's Key Industries*. The objective is to target program funds to ETP priority industries.

3. *Continue Support for Small Businesses*. The objectives are: improve outreach to small businesses through partnerships and develop new models for serving small business like Small *Business Incentive Caps in MECs.*
4. Support Governor's Initiatives and Hard-to-see Populations. The objectives are: continue to expand Veterans program; expand services to serving people with barriers to employment; continue targeting training projects in the Central Valley region, rural Northern California, Imperial Valley, and other HUAs; expand career opportunities for workers through support of pre-apprenticeship and apprenticeship programs; support worker returning to or remaining in the labor market; support workers and businesses impacted by the drought; continue to support green technology, training, and jobs.
5. *Enhance ETP's Impact on Job Creation and Retention.* The objective is to continue the Job Creation Pilot Program.
6. *Increase the Efficiency and Effectiveness of the ETP Program*. The objectives are: deploy ETP's new Data Management Information System to improve program efficiencies, and to ensure comprehensive, seamless data collection and reporting; continue ongoing, internal evaluation and assessment of program and contracting processes; continue to partner with the Labor and Workforce Development Agency to coordinate workforce services delivery; continue to maximize funding through the use of funding priority caps and allocations.

Mr. Maslac said, we recommend that the Panel approve the Fiscal Year 2015/16 Strategic Plan, with the direction to staff to incorporate any requested changes. Staff further recommends that the Panel delegate authority to the Executive Director for final approval, prior to submitting the Plan to the administration and legislature. Thank you for your time and I would be happy to answer any questions you may have.

Ms. Roberts asked, what happened to the administrative program that was in place a few years back? Mr. Maslac said, that has been renamed Employment Training Management System (ETMS). Ms. Roberts said, the priority industries identified in the Plan, are there any categories that are weighted more than the other, or are they weighted in the same bucket? Mr. Maslac said, right now they're all considered the same priority industries. Ms. Roberts said, it caused some hiccups over the last year. Do you have any strategies or strategic plan to staff through a bench program or some type of back field program? Mr. Maslac said, as you know it's hard for us to recruit new staff. We did fill five new positions during the past FY and those have been allocated to the field offices, so we should be seeing a faster turn-around rate in getting the projects out. Ms. Roberts said, in the past when retirees were coming up, that was the perfect storm, everybody was leaving all at the same time and you had a lot of vacancies. I just want to make sure that you look at your population and anticipate what is going on. Mr. Maslac said during the previous FY, we did get a Budget Change Proposal (BCP) approved and got five positions allocated.

Mr. Rodriguez asked, on the workforce side, how many total employees are at ETP? Mr. Maslac said, there are currently 90 employees. Mr. Rodriguez asked, are they all allocated for the field? Mr. Maslac said, I currently don't have that statistics.

Mr. Knox said in the regional offices, Ms. Torres has 8 and Mr. Griffin has 10. Mr. Chan is currently in the process of filling two positions; it's difficult to fill the job position in the Foster City and Los Angeles area because of the salary that the State pays. Mr. Atkinson has his full target number which is 6. Mr. Rodriguez said, so that's 28? Part of the strategic

planning, at least from my background is to understand where your client base is and then to begin the workforce analysis so that you are as close to your potential clients as possible to provide technical help and assistance which is one of our core missions.

Mr. Rodriguez asked, have we done an analysis in terms of the headquarter staff versus the people in the field? Is the balance and ratio correct in terms of the number of clients that come into the field offices, based on how many are going to be approved, the number of hours per client for assistance, number of conferences, etc.? Mr. Maslac said, I do believe with the five additional positions have been distributed through the field office, and in addition to that, we have five staff in the Applications and Assessment Unit (AAU), they determine eligibility of the applications, they are the first gatekeepers. The ratio of the staff working on getting the projects out is higher that it seems. I do believe that we are well staffed.

Mr. Knox said, this is really high in our mind right now. With the new system, ETMS, coming online by the end of this FY, one of the things we're looking at, is what is the function of each of the department units and the entities within the organization? Ms. McAloon and I will work with Mr. Mayall, Fiscal and Northern California District Manager and determine where the function will actually change with the new system coming online and what that will do with the staffing. New staffing obviously, but getting them closer to the customer is definitely one of our goals.

Mr. Rodriguez said, as an ETP board member I would like to see a deeper analysis, of the workload, workforce flow and number of proposals that are coming in from the field offices into the headquarters. I believe that's relatively important for the Panel. Mr. Broad said, we don't have the authority to structure the way the staff works. That is under the Executive Director's purview who is appointed by the Governor. Our job is to approve or disapprove the projects that are presented before us. We can request that information, talk about it, and make all the suggestions that we want, but we cannot change any of the staffing structure. Mr. Rodriguez said, let me clarify, what I'm saying is that part of any vibrant organization, part of any strategic plan, is work force analysis. This is what we do in the 21st century, and so I encourage you to move that direction if you can.

Chairman Broad asked for a motion to approve the Strategic Plan with the delegation of authority to the Executive Director for final approval, prior to submitting the Plan to the administration and legislature.

ACTION: Mr. Rodriguez moved and Ms. Roberts seconded the approval of the Fiscal Year 2015/16 Strategic Plan

Motion carried, 7 – 0.

X. Public Comments

Phillip Herrera, Consultant to ETP and GO-Biz

I handed out some flyers from California Life Science Association (CLSA); it's the merger between California Health Institute (CHI). This is actually good news report. I've been working with life science companies for the past few years, and will be working with them going forward. My experience is that both ETP and the Governor's economic development initiatives, which include California Competes, the sales and use tax exemption, and hiring credits are making a big difference for life sciences. As you look at the handout, there are some real eye-popping numbers. The number one state for biomedical venture capital investment is in California, which is 45%. The total number of direct and indirect jobs are 767,300; the wages are at $100,000. Last but not least, when you look at the amount of taxes and revenue that the industry creates, it's significant. I want to thank the Panel for their good work and funding several life science companies today and hope that we can continue that in the future.

Mr. Broad asked, are the 767,300 jobs in California or across United States? Mr. Herrera said those are in California and the 270,300 are direct jobs from the CLSA members, full-time employees. Mr. Herrera said there is another section that pertains to the medical materials.

XI. MEETING ADJOURNMENT

Mr. Rendon moved and Ms. Roberts seconded meeting adjournment at 11:27am.

Single Employer Contractor

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

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

These features apply to core program funding.

Multiple Employer Contractor

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

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

Retraining

- Training hours for retrainees are capped at 200. The Panel may modify this cap for good cause on a case-by-case basis.
- The MEC must provide union letters of support for represented employees.
- The MEC must make an "in kind" contribution toward the cost of training, of at least 50% of the ETP-funded amount. These contributions may consist of:

  1) wages/benefits paid during training by participating employers;
  2) development, recruitment, placement, and assessment costs; and,
  3) facility and material expenses.

- The MEC must provide a list of participating employers to demonstrate actual employer demand for the occupational skills in the curriculum.
- The MEC must have a core group of participating employers for at least 80% of the training plan.
- Participating employers must be subject to the Employment Training Tax.
- Participating employers must demonstrate an ongoing commitment to training, and represent that ETP funds will not displace existing resources.

New Hire Training

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

These features apply to core program funding.

Delegation Order Process

- The Panel has delegated authority to the Executive Director, without consultation with the Panel Chair, to approve (1) small business (100 or fewer employees) for $50,000 or less, and (2) single and multiple employer proposals for $100,000 or less.

- This procedure allows projects to be approved on a flow basis. This process recognizes the need for just-in-time training, and reduces or eliminates the need for a Consent Calendar.

- An ETP130 and Curriculum is prepared for each proposal. They are reviewed and approved after the Executive Director signs off. The effective date will be the date specified by the Field Analyst and if no date is specified, the earliest effective date of contract is the day after the project is approved by the Executive Director.

- A copy of approved Delegation Orders is included in each month's Panel Packet, for projects approved prior to the Panel meeting, as an information item.

From: Maureen Reilly, General Counsel Date: August 28, 2015

To: Panel Members

Subject: **No More Barriers**

The Panel is invited to consider a new program for ETP funding that fosters job creation and retention in full-time employment for persons with disabilities: **No More Barriers**. This program will confer the equivalent of Critical Proposal status, and offer the full array of Job Creation incentives, for training persons with disabilities. In essence, this will expand the current Job Creation Pilot in order to achieve three central policy goals:

1. Pay It Forward whereby ETP funds will foster full employment for disabled workers as an economic generator for the State of California.
2. Paying Back the many ETP-eligible employers that must now meet Section 503 Compliance goals to hire Individuals With Disabilities (IWD) at 7% of each "job group" working on a federal contract.
3. Forward Looking to increase ETP visibility among the 20,000 California employers holding federal contracts.

1. PAY IT FORWARD - Critical Proposal Status

No More Barriers will reward the employer's investment in human resources in the same manner as their purchase of new equipment, by conferring the equivalent of Critical Proposal status, for purposes of ETP funding.

As such, No More Barriers will recognize value-added to both employer and community when persons with disabilities workers are hired into permanent full-time jobs. Critical Proposal status will allow the highest funding priority for expedited eligibility determination and development. This status will be applied to the full proposal. However, it will not alter the funding cap or allocation. This means funding will be capped and allocated as pertinent to contract type per Fiscal Year.

Staff expects that the majority of this training will be ≤$100,000, at least in the first year. This would allow No More Barriers proposals to be approved by Delegation Order with expedited processing.

So long as there is a No More Barriers Job Number, Critical Proposal priority status will apply to the full proposal.

Job Creation

No More Barriers will recognize that employers may encounter significant costs related to training and retaining workers with disabilities, and frequently create or adapt positions as needed to accommodate the disabling condition. This concept allows ETP to "piggyback" onto the successful Job Creation program. Consistent with Job Creation, the new program will only apply to a Single Employer Contract (SEC). The key Job Creation incentives are:

- New Hire Reimbursement Rate ($20 per hour)
- New Hire Wage (ETP Minimum Wage, county-by-county)
- HUA wage modification available (by county or region)
- Up to 260 hours per-trainee (justification presumed)
- No Substantial Contribution
- No Turnover Rate Penalty
- Temp-to-Perm Hiring (also Part-time to Full-time and Seasonal)
- Literacy and Job Readiness at 50% total hours per-trainee

Since the Job Creation Pilot launched in January 2011, ETP has served some 93 employers training 3,415 workers with payment earned averaging 75%.

2. PAYING BACK - Employer Commitment

The new program will focus on employers that have already made a commitment to hire workers with disabilities, whether or not they need Section 503 Compliance. (See Rehabilitation Act of 1973 as amended in 2013. 41 CFR Part 60-741.) This will eliminate the risk associated with training unemployed workers who must be placed into permanent full-time positions and meet retention requirements for payment earned.

Most employers that hold federal contracts are in ETP priority industry sectors. For Section 503 Compliance these employers must recruit, hire, promote and retain Individuals With Disabilities (IWD) at 7% of the "job group" assigned to the federal project that is under contract. By way of example, for an engineering firm this would mean 7% of the Engineers assigned to the project must be IWD. For a Small Business holding a federal contractor or subcontract, the 7% hiring goal is applied across-the-board to the employer's full workforce. The Small Business reimbursement rate will apply even though these trainees will otherwise be considered Job Creation.

ETP eligible employers that hire disabled workers will qualify for funding under the new program regardless of whether they hold federal contracts.

Individuals With Disabilities (IWD)

As stated earlier, No More Barriers will mirror Job Creation, recognizing that employers create or adapt jobs as needed to support their commitment to hire persons with disabilities. The type of disability will vary from one employer to another, although the 7% hiring goal remains the same for Section 503 Compliance. The employer will be tasked with documenting eligibility.

For purposes of Section 503 outreach, the federal Office of Management and Budget (OMB) allows workers to "self-certify" using a simple online form that identifies 18 qualifying disabilities. This includes Veterans suffering from Post-Traumatic Stress Disorder. (OMB Form CC-305, *Voluntary Self-Identification of Disability*.) ETP will accept this certification.

Funding may be under Special Employment Training (SET) for employers that do not face out-of-state competition. If so, then eligibility may also be based on the "multiple barriers" standard for SET at Title 22, California Code of Regulations Section 4409(a)(7). These trainees will be funded under SET, but will qualify for Job Creation incentives if hired within the three-month window period.

Human Resources staff, and managers/supervisors overseeing disabled workers, will also be eligible for training under a separate Job Number. This training may include courses in Section 503 Compliance and related subjects. These trainees will not qualify for Job Creation incentives unless they also have disabilities and are hired within the window period. The managers/supervisors must be "frontline" if funding is under SET.

In keeping with the commitment to hiring disabled workers, employers must pay wages during all hours of ETP-funded training as a full In-Kind Contribution.

3. FORWARD LOOKING: Partners

Several other government programs offer financial incentives to employers for hiring and training persons with disabilities. They include:

- ✓ Workforce Innovation and Opportunity Act (WIOA) funding for adult education, flowing through the Employment Development Department (EDD)
- ✓ Tax credits for business expansion, administered by the Governor's Office of Business & Economic Development (GOBiz).
- ✓ Multiple programs to aid disabled worker recruitment and training, administered by the Department of Rehabilitation (DOR)

Supplemental Funding

ETP funding cannot be used to displace another government programs, pursuant to the requirement for Supplemental Funding at Unemployment Insurance Code Section 10200(a)(c). Traditionally, the Panel would require an employer's representation that ETP funding will not displace another such program. However, in keeping with the overarching policy interest in full employment for persons with disabilities, the Panel could acknowledge that the various programs supplement each other.

ETP funding flows relatively quickly and No More Barriers can be administered alongside other incumbent worker training. These factors should encourage eligible employers to contract with ETP and still be free to seek other sources of government funding to offset the high cost of recruiting, hiring training and retaining persons with disabilities.

The supplemental nature of ETP funding should be recognized as intrinsic to No More Barriers, without the need for employer certification or rate adjustment.

DOR Partnership

No More Barriers will be implemented in partnership with DOR. With more than 100 specialized staff statewide, DOR is assisting California employers in their efforts to reach federal hiring goals as required for Section 503 Compliance.

Of the Top 100 Federal Contractors, approximately 30% have previously received funding from ETP (14% direct contracts, 16% MEC participants). These are among the largest firms nationwide, and are a natural focal point for marketing the new program.

It should be noted that the OMB recently launched an initiative whereby federal entities are encouraged to contract directly with Small Business (rather than reaching this sector as subcontractors). Whether as a contractor or subcontractor, the ETP Small Business community will also have Section 503 Compliance training needs.

According to DOR, some 20,000 employers in the State of California hold federal contracts. These companies range in size from <100 employees to multinational. They must all reach Section 503 Compliance goals.

State Directive for WIOA

Employers may also benefit from career and training services funded by WIOA for adult participants. These services are prioritized to reach recipients of public assistance; other low-income individuals, and persons who are deficient in basic skills.

For purposes of administering WIOA funds, the Employment Development Department (EDD) has defined "priority" to mean at least 51% of participants must be either low-income, recipients of public assistance, or basic skills deficient. This does not negate WIOA priorities for serving Veterans.

ETP and DOR will coordinate with the California Workforce Development Board and local boards to fund training for employers that hire persons with disabilities. As such, the goals of No More Barriers are consistent with State of California directives under the Workforce Innovation & Opportunity Act (WIOA).

Marketing

The ETP Economic Development Unit will work closely with DOR to create a focused marketing campaign for the new program. ETP will also support development by other marketing partners and consultants. For example, ETP will make its logo available for print and electronic materials.

The features of this program are designed to be "unbundled" in order to fit the hiring interests of a particular employer. Eventually, No More Barriers should elevate the ETP profile in general, and eventually become a marketing tool for the core program.

Launching

If approved by the Panel today, this new program could take effect as early as October 1, 2015 with the possibility of retroactive amendment for contracts funded earlier this Fiscal Year and approved on or after July 1, 2015. The features of this program may be adjusted by the Panel going forward based on experience.

Guidelines for No More Barriers will be posted on the ETP website, along with links to other government programs that provide funding or assistance for hiring and training persons with disabilities. These guidelines will mirror the Job Creation Pilot.

RECOMMENDATION

Staff recommends adopting the No More Barriers program with the features outlined in this memorandum effective October 1, 2015. It is also recommended that No More Barriers be allowed as an amendment for contracts funded as of July 1, 2015 as may be applicable, on a retroactive basis.

RETRAINEE - JOB CREATION

Training Proposal for:

Pacific Imaging Management, LLC
dba Radiology Associates

Agreement Number: ET16-0153

Panel Meeting of: August 28, 2015

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

PROJECT PROFILE

Contract Attributes:	SET Job Creation Initiative Priority Rate	Industry Sector(s):	Healthcare Services Priority Industry: ☒ Yes ☐ No
Counties Served:	San Luis Obispo, Santa Barbara	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 101	U.S.: 101	Worldwide: 101
Turnover Rate:	3%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$151,068		$0	$0		$151,068

In-Kind Contribution:	100% of Total ETP Funding Required	$175,738

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET Priority Rate	Business Skills, Computer Skills, Cont. Imp., Advanced Tech.	91	8-200	0	$1,548	$20.55
				Weighted Avg: 86			
2	SET Retrainee Job Creation Priority Rate	Business Skills, Computer Skills, Cont. Impr., Advanced Tech.	5	8-200	0	$2,040	$12.33
				Weighted Avg: 102			

Minimum Wage by County: Job Number 1 (SET/Priority Industry): $20.55 per hour

Job Number 2 (Job Creation): $12.33 in San Luis Obispo and Santa Barbara counties.

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

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

Up to $2.35 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Job Number 1		
Accounting/Marketing Staff		8
Radiologist		11
Frontline Supervisor		11
IT Staff		4
Technologist		56
Licensed Vocational Nurse (LVN)		1
Job Number 2		
Front Office Staff		4
Technician		1

INTRODUCTION

Founded in 1959, Pacific Imaging Management, LLC dba Radiology Associates (RA) (www.rasloimaging.com) is a full-spectrum medical imaging and interventional radiology provider serving the Central Coast of California. The Company maintains three outpatient-imaging centers in Templeton, Pismo Beach and Santa Maria, all of which are participating in RA's first ETP Agreement.

RA's services include diagnostic, cardiac, vascular, gastrointestinal, genitourinary, magnetic resonance, musculoskeletal nuclear medicine imaging, bone density screening, computed tomography (CT) scans, digital mammography, fluoroscopy, and ultrasound. The Company

provides on-site physicians and board-certified radiologists to manage patient imaging exams, and interpret the collective results. RA's clients are patients locally referred by their physicians.

Advances in imaging technologies like the CT scan, magnetic resonance imaging (MRI), positron emission tomography, radiology information systems, digital mammography, molecular imaging, and speech recognition techniques have had a significant impact on diagnosis and treatment. These new technologies now provide a much higher level of detail allowing doctors early and accurate diagnosis, leading to treatment that is more successful. Imaging has largely replaced exploratory surgery, and patient exposure in imaging exams has been reduced dramatically. Therefore, the Company is investing in the latest equipment to ensure that its scanners consistently deliver the lowest possible dose of radiation during an exam.

Despite the advances in technology and equipment, the imaging industry is facing complex challenges. For years, expanding populations of aging and increasingly unhealthy patients have been driving the increased use of diagnostic imaging for nearly all medical conditions.

To remain competitive, RA must continue to ensure that imaging is accessible, and provided at a reasonable cost. To make informed decisions, patients are demanding access to information such as wait times, staff qualifications, imaging equipment and accreditation status in various categories enabling them to compare costs. As such, patients gravitate to businesses that pursue a higher level of service excellence, from initial contact and scheduling, to the final reporting.

To remain on the cutting edge, senior managers developed a formal training plan following a company-wide assessment to improve processes, reduce costs, increase customer satisfaction and meet upcoming challenges.

Retrainee - Job Creation

The Panel offers incentives to companies that commit to hiring new employees. Under the Retrainee-Job Creation program, training for newly-hired employees will be reimbursed at a higher rate and trainees will be subject to a lower post-retention wage. The Company also represents that these trainees will be hired into "net new jobs" as a condition of the contract.

In recent years, the government's healthcare reform initiatives to increase insured Californians, coupled with imaging replacing exploratory surgeries, RA's client volume has increased. In addition, recent trends towards higher out-of-pocket patient expense for imaging services has increased competition by pushing for greater cost transparency, higher quality and lower cost.

Within the next two years, the Company will invest three to four million in new MRI, CT, and an additional $850,000 in tomosythesis mammography equipment, which creates a 3-D image of breast tissue for more accurate exam outcomes.

RA is hiring up to five new employees (Front Office Staff, Technician) to fill new positions due to increased business. Increasing the number of Front Office Staff will help RA provide quality service upon initial patient-contact, and reduce wait and check-in time. RA represents that 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.

PROJECT DETAILS

The Company will provide experienced healthcare professionals for consultation, collaboration and assistance. As a result, the proposed training will help RA rapidly achieve high-impact, low-cost performance improvements.

Training Plan

Business Skills (5%): Training will be offered to Frontline Supervisors to help in coaching teammates, implement Lean projects for change and process improvement, and to help drive the internal functionality of the organization.

Computer Skills (5%): Training will be offered to Accounting/Marketing and IT Staff. Accounting Staff needs intermediate to advanced Microsoft Office training with an accent on Excel spreadsheets. Trainees will also be able to maintain proficiency in RA's accounting software updates, attend classes to fill skills matrix gaps, and learn new coding systems with the implementation of ICD-10 allowing for a greater level of detail.

Continuous Improvement (70%): Training will be offered to all occupations to implement Lean methodologies and participate in Lean process improvement events. Employees will be trained in lean tools such as Standard Work, 5S, and Value Stream Mapping to identify bottlenecks, create opportunities for improvement, and implement solutions to improve performance, customer satisfaction, and reduce procedure-cycle times. Rapid improvement events will uncover root causes such as scheduling inefficiencies, noncompliance with regulatory requirements, communication gaps, non-value-added activities, and misuse of resources. Kaizen events will benefit trainees in streamlining patient exam scheduling, registration, and denial processes.

Advanced Technology (AT) (20%): RA is requesting the AT rate of $26 per hour for up to nine newly hired Technologists and incumbent Technologists that need cross-training in different specialties. These jobs are in high demand and RA is having difficulty finding experienced workers to fill available slots. Trainees will learn to provide health services to clients applying pulsed radio frequency waves, and magnetic energy to assist in the diagnosis or treatment. These Technologists require extensive training by highly qualified subject matter experts with a specialty such as Radiology, CT, Mammography, MRI, and Ultrasound. Trainees will learn how to perform a variety of complex diagnostic radiographic and CT procedures with accuracy. Workers will also administer ionizing radiation using fluoroscopy, computed radiography, and CT with little or no supervision. Knowledge of anatomy, physiology and radiation physics/image production must transfer to practical exam situations.

Training will consist of up to 80 hours of lab activities to allow sufficient time on the equipment, and provide guidance in programming the computer and system controls. Individual training is necessary to have the trainee focus on the technological complexities and equipment functionality. The cost of the training is estimated at $55-$60 per hour/per trainee. Though the trainer-to-trainee ratio is 1:10 for AT, RA will provide training at a 1:1 ratio to allow in-depth coverage and personal attention from the instructor.

SET Frontline Worker

The Company uses several job classifications with a "supervisor" in the title. These frontline supervisors do not have the ability to hire or fire, and spend the majority of their work hours (at least 80%) as frontline workers being actively involved with customers and fellow employees. Based on the nature and scope of their job duties, these employees are not exempt from overtime compensation. Therefore, they meet the Panel's definition of frontline workers. As such, 11 Frontline Supervisors will participate in training to be able to develop work teams and coach and mentor team members.

Commitment to Training

RA represents that 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. RA's training budget is $10,000 per facility. This includes training in sexual harassment prevention, safety, healthcare regulations, new hire training and software updates.

- **Training Infrastructure**

Training will be provided by in-house subject matter experts on site, and will start upon approval. Each facility has a point person on staff responsible for scheduling, documenting hours and working directly with National Training Systems (NTS) and ETP staff to ensure that all contract obligations are met.

Impact/Outcome

The proposed ETP-funded training will help RA subsidize the high cost of training of new and generally inexperienced staff, and provide good jobs despite facing a host of challenges. As a result, trainees will be able to provide higher quality patient care with improved processes and quality outcomes. ETP funding will help the Company continue to meet patient demand, enhance exam quality, effectively use new advanced technology, and train new employees. These improvements will increase the commitment and retention of RA employees, reduce turnover and sustain growth.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

NTS in Ladera Ranch assisted with development of this proposal for a flat fee of $12,144.

ADMINISTRATIVE SERVICES

NTS 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

- Sales
- Strategic Marketing
- Supervisory Skills

CONTINUOUS IMPROVEMENT

- 5S
- Communication
- Conflict Resolution
- Crisis Prevention & Intervention
- Critical Thinking
- Customer Service
- Documentation
- Kaizen
- Leadership
- Lean Thinking
- Performance & Quality Improvement
- Preceptor Skills (Train-the-Trainer)
- Process Improvement
- Standard Operating Procedures
- Standard Work
- Value Stream Mapping

COMPUTER SKILLS

- ICD-10
- Microsoft Office (Intermediate/Advanced)
- Picture Archival Communication Systems
- Sage 100

AT

0-80 **ADVANCED TECHNOLOGY** (ratio 1:1)

- Computed Tomography
- Magnetic Resonance Imaging
- Mammography
- New Technologist Skills
- Nuclear Medicine
- Radiologic Skills
- Stereotactic Breast Biopsy
- Tomosythesis
- Ultrasound

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. AT is capped at 80 training hours per-trainee.

RETRAINEE - JOB CREATION

Training Proposal for:

Pandora Media, Inc.

Agreement Number: ET16-0144

Panel Meeting of: August 28, 2015

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

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative	Industry Sector(s):	Technology/IT Priority Industry: ☒ Yes ☐ No
Counties Served:	Los Angeles, Alameda	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 1,000	U.S.: 1,200	Worldwide: 1,500
Turnover Rate:	5%		
Managers/Supervisors: (% of total trainees)	20%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$249,600		$0	$0		$249,600

In-Kind Contribution:	100% of Total ETP Funding Required	$414,600

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Advanced Tech, Computer Skills, Business Skills	330	8-200	0-100	$720	$15.97
				Weighted Avg: 40			
2	Retrainee Priority Rate Job Creation Initiative	Advanced Tech., Computer Skills, Business Skills	10	8-200	0-100	$1,200	$13.31
				Weighted Avg: 60			

Minimum Wage by County: Job Number 1: $15.97 per hour in Los Angeles County, $16.44 per hour in Alameda County
Job Number 2: $13.31 per hour for Los Angeles County, $13.70 per hour in Alameda County

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

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

Up to $3.97 per hour may be used to meet the Post-Retention Wage in Job Number 1.
Up to $2.31 per hour may be used to meet the Post-Retention Wage in Job Number 2.

Job 1 & 2 Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Business Support Staff	*Job 1:* *Job 2:*	10 4
Advertising Operations/Account Managers		50
Design & Audio Designer/Producer		22
Engineer		10
Scientist		5
Marketing/Business Development Staff		26
Music Operations Staff		32
Product Management Staff		30
Sales Staff		20
Strategic Solutions Staff		24
Technical Operations/Information Technology Staff		40
Supervisor		30
Manager		36

INTRODUCTION

Pandora Media, Inc. (Pandora) (www.pandora.com) is a music streaming and automated music recommendation service. Pandora is an Internet radio which plays musical selections of a certain genre based on the user's artist selection on a wide range of smartphones, tablets, computers and car audio systems, as well as a range of other internet-connected devices.

Founded in 2000, Pandora started as a small company called Savage Beast Technologies with the idea of creating music preference profiles for users into an online music recommendation system using its proprietary Music Genome technology. Eventually, the Company used the genome as the engine of an Internet radio service that plays only the music users like.

With this technology, songs are analyzed according to musical features including details of instrumentation, harmony, lyrics, melody, rhythm and vocals. Users enter the name of a song and Pandora creates a playlist of songs with similar characteristics. Initially, the Company pursued a transitional strategy of technology licensing to third parties; however, it struggled to reach profitability under this model and nearly failed.

In 2004, the Company returned to its initial vision of producing customized radio stations and changed its name to Pandora Media, Inc. The following year, the Company launched "Pandora.com". Its service is free to its registered users with the option to pay for additional features. The Company has grown to over 250 million registered users.

Retrainee - Job Creation

The radio Internet industry is highly competitive and innovative; thus, Pandora is expanding its business capacity by adding new employees to existing functions to remain competitive. Pandora has committed to hiring and training 10 "net" new employees to develop new ideas, provide better service to its users, and support internal staff.

Trainees must be hired within the three-month period prior to Panel approval or during the term of contract. Newly hired employees will be reimbursed at a higher rate and trainees will be subject to a lower post-retention wage. Trainees will be hired into "net new jobs" as a condition of contract.

PROJECT DETAILS

Training Plan

Pandora is constantly refining its technology and expanding the platform it supports. With the rapid advancement of internet technology and new innovations being discovered, the Company must keep current with industry demands.

As a global technology company in an intensely competitive marketplace, Pandora must have an efficient workforce skilled across many platforms and different types of technologies so it can develop the best solutions and experiences for its users. The proposed training is designed to enhance Pandora's competitiveness by putting the Company in an optimal position to develop and market its service to users. The Company's training goal is to ensure its employees are performing at their best in their current roles and to gain new skills to take on new projects and opportunities within the Company.

Business Skills (80%) - Training will be offered to all occupations and will cover customer solutions, strategic and innovative thinking, quality processes, sales and marketing, and effective communication. This training will help staff better serve its users and grow from a start-up mentality to a fast-growing high-performing company. This training will help staff improve product development skills and equip them with the technical expertise to identify and resolve problems more efficiently.

Computer Skills (10%) - Training will be offered to all trainees to provide them the skills beyond the basics of each application and take advantage of each application's features to improve productivity and efficiency. Training will focus on providing custom classes for each department that integrates the specific workflows and requirements of each group. The goal is to provide job-specific skills that will be applied immediately after class.

Advanced Technology (10%) - Training will be offered to Engineers, Designers and Technical Staff. These trainees need advanced skills in in order to get ahead of the technology curve. AT will be delivered in highly technical learning environments, including special curricula, instructors and training labs. The trainer-to-trainee ratio for AT training is 1:10 to allow for in-depth coverage and personal attention from the instructor.

Commitment to Training

ETP funds will not displace the existing financial commitment to training. In support of continuous employee development, The Company's current training budget is approximately $200,000 and covers basic, non-job-specific classes through a central corporate learning program, which includes basic communication, leadership, product overview, and new hire orientation.

Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

Impact/Outcome

ETP-funded Training will enable Pandora to remain competitive in an industry with rapid and continuous changes in demands and processes. As the Company grows and expands, trainees must have the skills to adapt and excel in new markets, exhibiting their best technical skills and soft skills in multiple technologies and platforms.

- Training Infrastructure

  Pandora's Director of Sales Training & Enablement will oversee internal project administration. The company retained an outside administrative consultant to ensure that training documentation adheres to ETP requirements.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Pandora retained TheEnterprise U in Marina del Rey to assist with development of this proposal for a flat fee of $5,000.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

N/A

Exhibit B: Menu Curriculum

Class/Lab Hours
8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- Sales & Marketing Tools and Techniques
  - Sales Fundamentals
  - Sales Systems Overview
  - Ad Solutions Systems and Ad Platforms
  - Brand Operations
  - Managing Sales Accounts
  - Optimizing Sales Performance
  - Forecasting
  - Ad Profiling
  - Maximizing Partnerships & Industry Relations
  - Media Sales
  - Preparing Proposals
  - Understanding Advertisers' Goals
- Customer Solutions
- Risk Mitigation and Risk Review
- Creative Thinking and Problem Solving
- Partner Quality and Compliance
- Mobile Processes and Guidelines
- Effective Communication (Written and Verbal)
- Powerful Presentation Skills
- Managing Time and Priorities
- Competitive Product, Market, & Technology Knowledge
- Project Management
- Customer Service
- Teambuilding
- Leadership Skills
- Interpersonal Skills
- Strategic & Innovative Thinking
- Financial Fundamentals
- Effective Decision-Making
- Effective Goal-Setting
- Navigating Through Change
- Negotiating Skills
- Business Analysis & Business Intelligence
- Organizational Development Imperatives
- Knowledge Management
- Creating a Culture of Innovation & Execution
- Appreciating Our Differences
- Emotional Intelligence
- Leading Effective Meetings
- Audience Analysis & Listener Experience
- Ensuring Quality Processes

COMPUTER SKILLS

- Advanced/Intermediate Microsoft Office
  (Word, Excel, Outlook, PowerPoint, Access, Project)
- Graphics Applications and Web Programming Tools

ADVANCED TECHNOLOGY

(For IT, Engineering and Technical Staff)

Software Development, Databases, & It Management

- Agile Developer Essentials
- Analyzing Data
- Android Programming
- Apache Hadoop & Big Data
- C Programming
- Certified Scrum Master
- Certified Scrum Product Owner
- Cisco
- Clean Code Practices
- Database Engineering
- Django
- Git & GitHub
- iOS Programming
- Java
- Kanban for Development and IT/OPS
- Multiplatform Programming
- Network Security
- Node.js
- PHP Essentials
- Python
- Ruby
- Server Performance Tuning
- Software Lifecycle Methodologies (UML, Agile, Scrum)
- SQL
- Testing and Refactoring (C++, Java, Javascript)

WEB

- Cascading Style Sheets
- HTML
- JavaScript & JavaScript Frameworks
- Ruby on Rails

CBT Hours

0-100 **BUSINESS SKILLS**

- Accountability (1)
- Accounting Fundamentals (2)
- Agile Concepts (1)
- Brand Management (1)
- Budgeting Essentials (2)
- Building Trust (1)
- Business Analysis Fundamentals (2)
- Business Writing (1.5)
- Change Management (1.5)
- Coaching and Developing Others (2)

- Communication Effectiveness (2)
- Communicating Across Cultures (1)
- Conflict Resolution Fundamentals (1.5)
- Critical Thinking (2)
- Customer Experience (2)
- Customer Service Fundamentals (1)
- Decision-Making Fundamentals (1)
- Delegating Basics (1)
- Difficult Conversations (1)
- Effective Feedback (1)
- Effective Listening (1)
- Effective Meetings (1)
- Emotional Intelligence (1.5)
- Engaging Employees (1)
- Ethics & Integrity in the Workplace (2)
- Facilitation Skills (1)
- Influencing Others (1)
- Interpersonal Relationships (1.5)
- Leadership Fundamentals (2)
- Management Basics (2)
- Managing Diversity (1)
- Managing Your Emails and Writing Effective Emails (2)
- Marketing Essentials (2)
- Mentoring Others (1)
- Negotiation Fundamentals (2)
- Operations Management (2)
- Organizational Agility (1)
- Organizational Culture (1)
- Organizational Learning (1)
- Pandora U (2)
- Performance Management (2)
- Presentation Tips (2)
- Problem Solving (2)
- Process Improvement (1.5)
- Productivity Tips (1)
- Project Management Basics (2)
- Purchasing Essentials (1)
- Quality Systems (2)
- Risk Management (2)
- Sales Fundamentals (2)
- Setting Effective Goals (1)
- Strategic Planning (2)
- Talent Management (2)
- Tapping into Your Creativity (1)
- Teambuilding (2)
- Time Management Fundamentals (1)

COMPUTER SKILLS

- Acrobat Pro (2)
- Information Security for End Users (2)
- Microsoft Office
  - Access Database Fundamentals (2)
  - Excel Advanced Functions and Formulas (2)

- Excel Macros & PivotTables (2)
- PowerPoint Presentation Advanced Tips (2)
- Project Basics (2)
- Word Advanced Topics (2)

- Photoshop
  - Photoshop Basics (2)
  - Photoshop Beyond Basics (2)

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

Amendment Proposal #1 for:

Riviera, Inc. dba The Enterprise U

Agreement Number: ET15-0221

Panel Meeting of: August 28, 2015

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

CURRENT PROJECT PROFILE

Contract Type:	Retrainee SB<100 Priority Rate	Industry Sector(s):	Manufacturing Services
Counties Served:	Los Angeles, Orange, San Diego, San Francisco, Santa Clara, Tulare	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☐ Yes ☒ No	Priority Industry:	☒ Yes ☐ No

Current Contract Term: September 2, 2014 to September 1, 2015

Current Funding	In-Kind Contribution
$205,300	$347,791

AMENDMENT FUNDING

Requested Funding	Support Costs	Amendment Funding	In-Kind Contribution
+$192,000	+$13,300	+$205,300	+$347,792

Total Funding
$410,600

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 Priority Rate	Business Skills, Computer Skills, Continuous Imp., Literacy Skills, Mfg. Skills, Adv. Technology	**300**	8-200	0	$770	$14.90
				Weighted Avg: 40			
2	Retrainee	Business Skills, Computer Skills, Continuous Imp., Literacy Skills, Mfg. Skills, Adv. Technology	**100**	8-200	0	$962	$14.90
				Weighted Avg: 60			
3	Retrainee SB<100 Priority	Business Skills, Computer Skills, Continuous Imp., Literacy Skills, Mfg. Skills, Adv. Technology	**100**	8-60	0	$834	$14.90
				Weighted Avg: 30			

Minimum Wage by County: $16.25 per hour for San Francisco and Santa Clara Counties; $16.04 per hour for Los Angeles County; $15.98 per hour for Orange County; $15.60 per hour for San Diego County; and $14.90 per hour for Tulare County.
Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: ☐ Yes ☐ No ☒ Maybe
Participating employers may use health benefits up to $5.25 per hour to meet the Post-Retention Wage.

Wage Range by Occupation	
Occupation Titles	Wage Range
Accounting and Finance Staff	
Administration and Operations Staff	
Information Technology and Engineering Staff	
Manager	
Marketing and Sales Staff	
Production Staff	

INTRODUCTION

Riviera, Inc. dba The Enterprise U (The Enterprise U), founded in 2001, is a for-profit private training agency. The Enterprise U helps companies, governments, and individuals acquire and sustain a competitive advantage through learning and provides training services, consulting, coaching, and software solutions to clients in the industries of manufacturing, entertainment, technology, logistics, and biotechnology.

AMENDMENT DETAILS

This proposal was originally presented to the Panel on July 25, 2014 in the amount of $410,600. In consideration of ETP Fiscal Year 2014/2015 funding constraints, the Panel held the proposal until August and then cut the amount of funding in half. The Panel took this same action with other Multiple Employer Contract (MEC) proposals. The Panel advised that contractor request the remaining funding up to the maximum cap of $750,000 when they have at least 70% performance. Currently, The Enterprise U has documented 83% in eligible Class/Lab training hours as reported in the ETP Online Tracking System. (See table below.) Although some training was initially rescheduled due to ETP funding constraints, training has since been restored and is still in demand.

The Enterprise U is also requesting to extend the Agreement term by six months to allow time to complete training.

In summary, this Amendment will:

- Increase the Agreement amount by $205,300 (from $205,300 to $410,600);
- Increase they estimated number of trainees by 375 (from 250 to 500);
- Extend the term by six months (09/02/2014-09/01/2015 to 09/02/2014-03/01/2016).

RECOMMENDATION

Staff recommends approval of this Amendment.

CURRENT CONTRACT PERFORMANCE

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

Agreement No.	Approved Amount	Term	No. Trainees (Average)	No. Completed Training	No. Retained
ET15-0221	$205,300	09/02/2014–09/01/2015	250	43	43

Training commenced on 09/02/14 and is ongoing for 165 trainees. The ETP class/lab tracking system reflects that The Enterprise U has documented over 7,700 hours of eligible training hours which equates to potential earnings of approximately $170,438 (83%).

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

American International Industries, Inc.

Agreement Number: ET16-0146

Panel Meeting of: August 28, 2015

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

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate HUA	Industry Sector(s):	Manufacturing Priority Industry: ☒ Yes ☐ No
Counties Served:	Los Angeles	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 733	U.S.: 733	Worldwide: 740
Turnover Rate:	12%		
Managers/Supervisors: (% of total trainees)	8%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$306,684		$0	$0		$306,684

In-Kind Contribution:	100% of Total ETP Funding Required	$413,757

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Continuous Improvement, Hazardous Materials, Management Skills, Manufacturing Skills	213	8-200	0	$1,260	$15.97
				Weighted Avg: 70			
2	Retrainee Priority Rate HUA	Business Skills, Computer Skills, Continuous Improvement, Hazardous Materials, Management Skills, Manufacturing Skills	133	8-200	0	$288	$11.98
				Weighted Avg: 16			

Minimum Wage by County: Job Number 1: $15.97 per hour for Los Angeles County

Job Number 2 (HUA): $11.98 per hour for Los Angeles County

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

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

Up to $1.98 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Accounting/Finance Staff		8
Administration/Human Resources Staff		20
Customer Service Staff		8
Information Technology Staff		5
Maintenance Staff		24
Marketing/Advertising Staff 1		29

Marketing/Advertising Staff 2		10
Manager/Supervisor 1		19
Manager/Supervisor 2		8
Operations/Production Staff		42
Sales Staff 1		6
Sales Staff 2		3
Transportation Staff		6
Warehouse Staff		28
Job Number 2 (HUA)		
Administration/Human Resources Staff		9
Customer Service Staff		10
Maintenance Staff		9
Operations/Production Staff		59
Transportation Staff		3
Warehouse Staff		43

INTRODUCTION

American International Industries, Inc. (American International) (www.aiibeauty.com) is a manufacturer and distributor of innovative beauty products for men and women. American International was founded in 1972 and is located in Commerce. The Company has nearly 40 brands of products that are sold to various retailers such as Walmart, Target, Walgreens, and CVS, as well as boutique and beauty supply establishments.

PROJECT DETAILS

American International has been operating with the same software system for more than 20 years, and the Company has determined that its legacy system no longer meets its needs. Therefore, the Company is in the process of converting to a new Windows-based Enterprise Resource Planning (ERP) system. This conversion will bring about complete changes to the Company's processes, hardware, and software capabilities. Consequently, employees must learn the functionality of the new system and how it will impact their respective day-to-day job responsibilities.

American International has invested over $1.7 million in new hardware and software for its new system. The new ERP system is projected to go live during the first or second quarter of 2016 and a significant amount of training must be provided to all users prior to the launch date. ETP funding will allow the Company to provide the level of training necessary to fully integrate the Company's core business operations. Training will take place at the Company's facility in Commerce and be delivered by a combination of in-house subject matter experts and experienced outside training vendors.

In addition to the extensive training to facilitate the ERP system implementation, the Company has developed a comprehensive training plan that includes Business Skills, Continuous Improvement, Management Skills, Hazardous Materials Handling, and Manufacturing Skills to

ensure that all processes and procedures continue to move the Company towards becoming a high performance workplace.

Training Plan

Business Skills (10%) - Training will be offered to all occupations. These training modules are designed to help employees improve their communication, product knowledge, and customer service skills. Trainees will learn to perform business-related tasks more effectively, and interact more successfully with internal and external customers.

Computer Skills (55%) - Training will be offered to all trainees to facilitate the successful implementation of the new ERP system that fully integrates all aspects of the Company's processes and network infrastructure. Training will include updates to production equipment software. This training is designed to increase worker productivity by empowering system users to manage projects and multiple sources of data, process orders, respond quickly to problems, and perform tasks with greater efficiency.

Continuous Improvement (5%) - Training will be offered to all occupations. This training will focus on process improvements and problem solving methodologies that enhance productivity through frontline leadership and team building.

Hazardous Materials (5%) - Training will be offered to Maintenance and Operations/Production staff. These trainees will learn safe handling procedures for hazardous materials, including propane.

Management Skills (10%) - Training will provide Managers and Supervisors with the leadership, motivation, and decision making skills necessary to become more effective leaders in a high-performance workplace.

Manufacturing Skills (15%) - Training will be offered to Operations/Production and Maintenance staff. This training is designed to improve product quality, reduce production errors/waste, and enhance the Company's overall manufacturing process. These training modules will include Lean Manufacturing philosophies and equipment operation skills.

High Unemployment Area Wage Modification

All trainees in this proposal work in a High Unemployment Area (HUA). This is a region with unemployment exceeding the state average by at least 25%. The Company's facility in Commerce qualifies for HUA status under these standards.

For these trainees, the Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. American International is requesting the wage modification of $11.98 for 133 trainees (Job Number 2).

Commitment to Training

ETP funds will not displace the existing financial commitment to training. The Company spent approximately $50,000 on training in 2014. Company-funded training includes sexual harassment prevention, new hire orientation, labor laws, and on-the-job training, as needed. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

- Training Infrastructure

The Company will assign an internal Project Manager to serve as the overall team lead for this project. Additional assistance will be provided by Human Resources and IT staff, as well as a steering committee for the ERP implementation. The Company has also retained an outside administrative consultant to ensure that training documentation adheres to ETP requirements.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Tax Credit Co. in Los Angeles assisted with development of this proposal for a flat fee of $10,000.

ADMINISTRATIVE SERVICES

Tax Credit Co. will perform administrative services for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

Epicor Software in Irvine will provide Computer Skills training for a fee to be determined. 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
- Business Performance
- Effective Communication
- Customer Service
- New Product Knowledge
- Strategic Planning
- Business Writing
- Conflict Management
- Interpersonal Skills
- Project Management

COMPUTER SKILLS
- Production Equipment Software
- Intermediate and Advanced Microsoft Office Suite
- ERP Implementation Topics

CONTINUOUS IMPROVEMENT
- Leadership Skills
- Team Building
- Decision Making
- Statistical Process Control
- Handheld Scanners

HAZARDOUS MATERIALS
- Waste Handling
- Dealing with Toxic Spills
- Hazardous Materials Procedures
- Handling Propane

MANAGEMENT SKILLS (Managers and Supervisors Only)
- Coaching
- Leadership
- Motivation
- Decision Making

MANUFACTURING SKILLS
- Production Procedures
- Equipment Operations
- Production Cross Training
- Precision Measurement
- Fork Lift Operation
- Lock Out Tag Out
- Lean Manufacturing/SixS

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

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Fender Musical Instruments Corporation

Agreement Number: ET16-0145

Panel Meeting of: August 28, 2015

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

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Manufacturing Multimedia/Entertainment Priority Industry: ☒ Yes ☐ No
Counties Served:	Los Angeles, Riverside, San Bernardino	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☐ Yes ☒ No		
Number of Employees in:	CA: 714	U.S.: 1,088	Worldwide: 2,163
Turnover Rate:	17%		
Managers/Supervisors: (% of total trainees)	4%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$586,800		$82,080 15%(Job No.1)	$0		$504,720

In-Kind Contribution:	100% of Total ETP Funding Required	$894,822

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 (Corona)	Business Skills, Computer Skills, Cont. Imp., Literacy Skills, Mfg. Skills	608	8-200	0-52	*$765	$15.07
				Weighted Avg: 50			
2	Retrainee Priority Rate	Business Skills, Computer Skills, Cont. Imp., Literacy Skills, Mfg. Skills	44	8-200	0-52	$900	$15.07
				Weighted Avg: 50			

*Reflects Substantial Contribution

Minimum Wage by County: Job Number 1: $15.07 per hour for Riverside County
Job Number 2: $15.97 per hour for Los Angeles County; $15.07 per hour San Bernardino County

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

Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe
Up to $4.47 per hour may be used to meet the Post-Retention Wage in Job Numbers 1 & 2.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1 - Corona		
Administrative Staff		1
Distribution Staff		26
Distribution Staff II		1
Engineer		14
Manager/Supervisor		12
Manager/Supervisor II		15
Marketing/Sales Staff		37
Production Staff		470
Production Staff II		23
Production Staff III		3
Research & Development Staff		5
Research & Development Staff II		1
Job Number 2 – Los Angeles/San Bernardino		
Administrative Staff		2
Distribution Staff		28
Marketing/Sales Staff		12
Manager/Supervisor		2

INTRODUCTION

Fender Musical Instruments Corporation (FMIC), headquartered in Scottsdale, Arizona, was founded in 1946. At its Corona facility, FMIC manufactures fretted instruments such as acoustic and electric guitars and basses, guitar amplifiers, and percussion products. It also distributes other musical instruments and accessories. FMIC's customers are music retailers, mass merchants, online, catalog retailers and third party distributors. FMIC's worldwide end consumers include professional and amateur musicians and musical instrument collectors.

FMIC also has a distribution facility in Ontario and a showroom and marketing facility in Burbank. All three facilities will participate in training. FMIC is eligible for standard retraining under the out-of-state competition provisions for industrially-classified manufacturers.

PROJECT DETAILS

In the competitive musical instrument marketplace, the trend in creating more customized and refined instruments that create an aspirational desire for consumers to upgrade and purchase new products continues to be the best strategy for maintaining FMIC's tradition for making high-quality products. Since the Company introduced its line of handcrafted production guitars, these new, more exclusive products have resulted in additional revenue streams for the Company.

In order to maintain its success, FMIC must complete the change in production processes it began with its last ETP project. Instead of producing larger runs of its standard product lines, it must now continue producing its higher quality instruments in shorter runs as demand dictates. A key focus for the Company has been to increase its introduction of diverse new products on a timely basis.

Employees must learn new processes, new equipment and technologies. ETP training funds will support this effort.

In addition, FMIC is in the process of installing at least eight new machines that will improve production: wood milling machines, sanding, buffing/polishing machines, final assembly equipment and sub-assembly electronics equipment. Some of the equipment was installed earlier this year but most will be installed over the next year (early 2016). The total cost of the new equipment is estimated at over $850K.

The Company also re-structured its marketing department and is focused on eCommerce, an online digital presence and new marketing techniques. A future Los Angeles office is expected to open in early 2016 that will support the new marketing plan.

Prior Project

This will be the Company's second within the last 5 years. The previous ETP project focused training on the "back end" of its production process: final assembly, finishing and the amplifier unit. For this project, the Company plans to continue to build more work cells (groups of production workers) and focus on the "wood milling-to-mid-point" in the process, reduce waste and create a streamlined efficient flow. The long-term plan is to connect these work cells into a continuous, efficient supply chain. Training in Manufacturing Skills will focus in these areas to complete the training begun in the first project.

Training Plan

Business Skills (12%) - Training will be offered to all occupations. Training will include eCommerce, Effective Leadership, Project Management, Purchasing/Procurement and Sales. Training will support process and production improvements, and increase new product line sales.

Computer Skills (18%) - Training will be offered to Engineers, Manager/Supervisors, Administrative, Distribution, Marketing/Sales and Production Staff. Training will focus on job-specific training in Adobe Illustrator, Demandware, Google Analytics, Tableaux, digital post-production, eCommerce, Excel, digital film editing and other software and system applications.

Continuous Improvement (49%) - Training will be offered to Manager/Supervisors, Engineers Administrative, Distribution, Marketing/Sales and Production Staff. Training will focus on improving production processes through Introduction to Lean, Process Improvement, Problem Solving, Six Sigma and other related skills.

Literacy Skills (3%): Training will be offered to Production Staff in Vocational English on-the-job so workers may benefit from the skills training provided.

Manufacturing Skills (18%): Training will be offered to Manager/Supervisors, Administrative, Distribution and Production Staff. Training will include CNC equipment, guitar inspection, machine/equipment operation, cross-functional production, guitar repair as well as other related production skills. Training will focus on shorter production runs on a greater variety of customized, high-quality products.

To support Class/Lab training, FMIC will also provide up to 52 hours of Computer-Based Training in Business, Manufacturing and Computer Skills. CBT will allow trainees to train at their own pace and will not exceed 50% of total training hours per trainee.

Substantial Contribution

FMIC is a repeat contractor with payment earned in excess of $250,000 within the last 5 years at the Corona facility, one of 3 facilities where training will take place in this Agreement. (See Prior Project Table.) Accordingly, reimbursement for trainees at FMIC's Corona facility (Job Number 1) will be reduced by 15% to reflect the Company's $82,080 Substantial Contribution to the cost of training.

Commitment to Training

FMIC reports that it spends $430,000 on training annually at its California facilities. The Company provides the following training: company orientation, safety training based on position/department or equipment used, job specific training, leadership training focused on performance management, California labor laws and regulations and anti-harassment training for supervisor level and above.

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

- Training Infrastructure

  FMIC has the full support of management to conduct the proposed training. The Company has dedicated administrative staff at each location who will administer the project, as well as assistance from an administrative subcontractor, The IM Group.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET13-0358	Corona	5/6/13 – 5/5/15	$587,520	$419,315 (71%)

To date, ETP's online tracking system shows FMIC completed 23,561 eligible training hours for $424,098 (72%) in eligible earnings if all requirements are met. FMIC submitted the final (closeout) invoice on 6/23/15, which was processed on 7/27/15. Final totals show that 272 trainees completed all retention requirements.

DEVELOPMENT SERVICES

The IM Group in Fairfield, CT assisted with development of this proposal at no cost.

ADMINISTRATIVE SERVICES

The IM Group in West Hollywood will 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

- Adwords Based Marketing
- Audience Development
- Conversion Implementation & Tracking
- Corporate Financial Understanding & Analysis
- Creative Development
- Crucial Conversations
- Digital Education & Instructional Design
- Effective Leadership
- Executing Strategy at the Frontline
- Google Certification
- Project Management
- Purchasing & Procurement Essentials
- Resolving Workplace Conflict
- Search Engine Optimization for eCommerce (marketing)
- Social Media Production & Measurement
- Supervisory Skills

COMPUTER SKILLS

- Adobe Illustrator
- Audio Visual Production & Editing
- Business Warehouse Inventory System
- Demandware
- Google Analytics
- Human Resources Information System
- Mastercom Software
- Microsoft Excel – Intermediate
- Motion Graphics
- Quality Management System
- Systems, Applications & Products
- Tableau Software
- Total Preventative Maintenance System UX/UI Design

CONTINUOUS IMPROVEMENT

- Introduction to Lean
- Problem Solving
- Process Improvement
- Six Sigma

MANUFACTURING SKILLS

- CNC
- Guitar Inspection Certification
- Production Machinery

- Cross-Functional Process
- Training Within Industry
- Guitar Repairs

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

LITERACY SKILLS

- Vocational English as a Second Language

Must be job related and hours are capped at 45% of a trainee's total training hours

CBT Hours

0-52

BUSINESS SKILLS

- Adwords Based Marketing (4 hrs)
- Audience Development (2 hrs)
- Conversion Implementation & Tracking (4 hrs)
- Creative Development (2 hrs)
- Digital Education & Instructional Design (2 hrs)
- Search Engine Optimization for eCommerce (4 hrs)
- Social Media Production & Measurement (2 hrs)

COMPUTER SKILLS

- Adobe Illustrator (4 hrs)
- Audio Visual Production & Editing (2 hrs)
- Demandware (6 hrs)
- Google Analytics (4 hrs)
- Microsoft Excel – Intermediate (0.5 hrs)
- Motion Graphics (1 hr)
- Tableau Software (4 hrs)
- UX/UI Design (6 hrs)

MANUFACTURING SKILLS

- Guitar Inspection Certification (2 hrs)
- Guitar Repairs (2 hrs)

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

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Retrainee – Job Creation

Critical Proposal for:

Hyundai Capital America

Agreement Number: ET16-0142

Panel Meeting of: August 28, 2015

ETP Regional Office: San Diego **Analyst:** S. Godin

PROJECT PROFILE

Contract Attributes:	Critical Proposal Job Creation Initiative Retrainee	Industry Sector(s):	Financial Services Services Priority Industry: ☐ Yes ☒ No
Counties Served:	Orange	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 1,500	U.S.: 6,400	Worldwide: 80,000
Turnover Rate:	14%		
Managers/Supervisors: (% of total trainees)	20%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$514,800		$0	$0		$514,800

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

TRAINING PLAN TABLE25

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Critical Proposal	Business Skills, Commercial Skills, Computer Skills, Cont. Imp.	575	8-200	0-30	$864	$20.31
				Weighted Avg: 48			
2	Job Creation Initiative Retrainee	Business Skills, Commercial Skills, Computer Skills, Cont. Imp.	15	8-200	0-30	$1,200	$20.31
				Weighted Avg: 60			

Minimum Wage by County: Job Number 1: $16.02 per hour in Orange County; Job Number 2 (Job Creation): $13.35 per hour in Orange County

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

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

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
Analyst I		200
Analyst II		200
Analyst III		70
Manager I		50
Manager II		50
Manager III		20

Critical Proposal

The Governor's Office of Business and Economic Development (Go-Biz) have designated this project as a Critical Proposal. The Critical Proposal designation is based on Hyundai Capital America (HCA) expanding within California through the addition of new jobs and plant expansion.

INTRODUCTION

Formed in 1989, HCA (www.hyundaicapitalamerica.com), a subsidiary of Hyundai Motor America, is the finance arm of Hyundai Motor Corporation. Headquartered in Irvine, with operation centers in Dallas and Atlanta, HCA provides loan financing for two brands: Hyundai Motor Finance and Kia Motors Finance. Its financing solutions include dealer inventory and facility financing; indirect vehicle financing; leasing solutions; and vehicle protection plans.

HCA reports that it has experienced tremendous growth over the past five years in assets, financing revenue and the number of retail customers. Assets have doubled from $14 billion to $28 billion; financing revenue has grown from $1.14 to $2.85 billion during the same period, and retail customers now number over one million. HCA is currently challenged by the fact that its current California facilities are no longer adequate to support its volume of business. Therefore, HCA is planning to relocate and consolidate into a larger corporate facility in Newport Beach beginning in August 2015 with relocation completed in September 2015. The Irvine location will continue to be used until 2019. In addition, although HCA previously outsourced certain customer service and support jobs, it is bringing those functions in-house throughout this CY2015.

PROJECT DETAILS

The training emphasis in this proposal is on companywide implementation of two software programs: Ariba e-Procurement system (Ariba) and Apptio IT Planning Foundation (Apptio). Both systems replace older in-house legacy systems.

Ariba is an ERP platform that will streamline the procurement process by electronically connecting HCA with its vendors. This should result in faster supplier sourcing, credit approvals, invoice processing and standardized contracting. The software will impact operations across all departments. The Apptio IT Planning Foundation software is a finance/accounting tool that will improve budgeting, planning, and financial performance reporting processes. Ariba launched in July 2015 and Apptio is scheduled for implementation during the fourth quarter of 2015.

HCA has also identified the need to manage its growth through high performance work teams and standardizing operating procedures. Previously outsourced internal and external service support functions will require training to provide faster resolutions and maximize efficiencies.

Retrainee - Job Creation

HCA states that it plans to hire over 100 full-time workers while expending over $105 million in new investments over the next five years. In this proposal, HCA has committed to hiring at least 15 net new full-time workers during the term of the proposed ETP Agreement to support the new customer service (business) functions being brought in-house. The new employees will require extensive training to develop the requisite skills needed to perform the new business functions.

HCA represents that the date-of-hire for all trainees in the Job Creation program (Job Number 2) will be within the three-month period before contract approval or within the term-of-contract. The Company also represents that these trainees will be hired into “net new jobs” as a condition of contract.

Temporary to Permanent Hiring

HCA estimates that seven trainees in Job Number 2 (Job Creation) will fall under Panel guidelines for “temporary to permanent” employment. HCA will retain these employees through a temporary agency, with the intention of hiring them into full-time, permanent positions after training. These trainees must be determined eligible to participate in ETP-funded training before the start of training, while on the payroll with the temporary agency (Unemployment Insurance Code Section 10201(c).). The retention and post-retention wage requirements cannot be satisfied until after they have been hired.

Training Plan

All training will be delivered by in-house experts in the following:

Business Skills (5%): Training in Business writing, project management and facilitator training will be offered to all occupations as it relates to individual job function. These skills sets will improve operational efficiency.

Commercial Skills (60%): Training will be offered to all occupation to ensure staff has an in-depth understanding of HCA's retail/lease products and services; key financial terms; dealer loan transactions; and HCA credit policies and procedures. Training will give each worker the necessary skills to perform their specific jobs.

Computer Skills (20%): Training will be offered to all occupations based on individual need and job function. Training will focus on the Ariba e-procurement system; Apptio IT Planning Foundation Software; Loan Management Software; SAS Programming Skills; Intermediate MS Office, and Network Administration & Management. Training is essential to improve performance and meet HCA financial compliance requirements.

Continuous Improvement (15%): Training will be delivered to all occupations and is designed to improve processes and efficiencies throughout the organization. These skills will give trainees the skills to manage performance and process improvements, think strategically, and set appropriate goals for themselves and the organization.

Computer-Based Training (CBT)

HCA will offer up to 30 hours in CBT to all occupations in many of the same skills identified in class/lab above. CBT training will provide a method to reinforce the training taught through the class/lab methodologies. In addition, some compliance training requires CBT so it can be tracked and certified. CBT hours are capped at 50% of total training hours per-trainee.

Reimbursement Rate

Although HCA is classified as a non-priority industry, this project has been designated as a Critical Proposal and therefore, will receive the ETP Priority reimbursement rate of $18 per hour.

Commitment to Training

The annual training budget for California is $350,000. Training consists of basic orientation and an overview of company policies and procedures; basic computer skills; violence in the workplace prevention; sexual harassment prevention; and ethics and diversity training. HCA states that ETP funds will not displace the existing financial commitment to training.

Training Infrastructure

HCA will begin training following Panel approval. HCA's Learning & Development Team is comprised of four full time employees responsible for the scheduling, implementation delivery and tracking of all ETP-funded training. Project Administration will be provided by in-house staff.

Impact/Outcome

Training goals include new technologies, software systems, and continuous improvement skill sets necessary to successfully manage company growth and provide long term career opportunities for employees to grow within the organization as HCA moves to a high performance workplace.

Other Resources

HCA has been awarded a 2015 California Competes Tax Credit in the amount of $1,200,000.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Deloitte Tax, LLP in San Francisco assisted with development of this proposal for a flat fee of $50,000.

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
- Train-the-Trainer/Facilitator Skills
- Franklin Covey's Project Management for the Unofficial Project Manager

COMMERCIAL SKILLS

- Customer Service-Universal Servicing New Hire
  - Retail Products
  - Lease Products
  - Support Billing Overview
  - Payment Problems Overview
  - Call Information in CRM Software Tool
- Funder Analyst New Hire- Funder Analyst I
  - HCA Consumer Credit Department Overview
  - Funding Process Guidelines
  - Roles & Responsibilities for Retail/Lease
  - Daybreak Software Functionality
  - Key Financial Terms
  - Financing Policies & Procedures
- Credit Analyst New Hire – Credit Analyst I
  - Credit Buying Process & Guidelines
  - Hyundai/Kia Finance Plans/Programs
  - Credit Policies & Procedures
- Credit Analyst New Hire – Credit Analyst II
  - Dealer Production Reports
  - The 5C's of Credit
  - Credit Decision Workflow
  - Dealer Relationships
  - Reviewing an Application
- Legislative Updates
- Lease and Retail Contracts Basics
- Dealer Loan Transactions

COMPUTER SKILLS

- Oracle Applications
  - Oracle Business Intelligence Enterprise Edition- Create Analyses and Dashboards
  - Oracle Business Intelligence Enterprise Edition- Credit Report
- Software Systems Training
  - Ariba e-Procurement System
  - Apptio IT Planning Foundation
  - Automatic Data Processing Upgrade Training
  - Siebel Customer Service Relationship Manager
- Loan Management Software Training
  - LeasePak Loan Origination System for Lease Accounts
  - Daybreak Loan Origination System for Retail Accounts
- SAS Programming Level 1: Essentials

- SAS Programming Level 2: Data Manipulation Techniques
- SAS Programming Level 3: Data Manipulation Techniques
- Accounting and Tax Software Training – Blackline/Vertex
- Access Training
- Microsoft Excel Level 2
- Microsoft Excel Level 3
- PowerPoint - Advanced

CONTINUOUS IMPROVEMENT

- Discovering Types of Communication in Teams
- Presentation Skills
- Organizational Change Management
  - Blue Belt Certification
  - Black Belt Certification
  - Master Black Belt Certification
- Strengths Finder 2.0
- Consulting Boot Camp
- Communications (Executive Communication Strategy)
- Leadership Skills
- Project Management Skills
- Coaching & Mentoring Skills
- Situational Leadership
- Change Management Skills

CBT Hours

0-30

BUSINESS SKILLS

- Project Management Fundamentals (2.5 hrs)
- Financial Statements for Non-Financial Professionals (1 hr)
- Contract Execution and Review Process Overview (1 hr)
- The Balance Sheet (1 hr)
- Introduction to Business Analysis and Essential Competencies (2 hr)
- Interpersonal Communication (1 hr)
- Working for Your Inner Boss: Personal Accountability (2 hr)
- Negotiation Essentials: Communicating (1 hr)
- Interpersonal Communication: Communicating with Confidence (1 hr)
- Managing Your Career: Creating a Plan (1 hr)
- Personal Productivity Improvement: Managing Tasks and Maximizing Productivity (1 hr)
- Overcoming Challenges of Managing Top Performers (1 hr)
- Business Writing: Know Your Readers and Your Purpose (1 hr)
- Fair Lending (.5 hr)
- Manager Development Program (2.5 hr)

COMPUTER SKILLS

- Accounting and Tax Software Systems Training (10 hrs)
  - Blackline Accounting Software
  - Vertex Sales Tax Software

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

RETRAINEE - JOB CREATION

Training Proposal for:

Taylor-Listug, Inc. dba Taylor Guitars

Agreement Number: ET16-0143

Panel Meeting of: August 28, 2015

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

PROJECT PROFILE

Contract Attributes:	Job Creation Initiative Priority Rate Retrainee	Industry Sector(s):	Manufacturing Multimedia/Entertainment Priority Industry: ☒ Yes ☐ No
Counties Served:	San Diego	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 435	U.S.: 435	Worldwide: 910
Turnover Rate:	17%		
Managers/Supervisors: (% of total trainees)	9%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$428,440		$0	$0		$428,440

In-Kind Contribution:	100% of Total ETP Funding Required	$479,893

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, Literacy Skills, Mfg Skills, PL-Mfg Skills	429	8-200	0	$720	$15.93
				Weighted Avg: 40			
2	Retrainee Job Creation Initiative Priority Rate	Business Skills, Computer Skills, Continuous Impr, Literacy Skills, Mfg Skills, PL-Mfg Skills	98	8-200	0	$1,220	$13.28
				Weighted Avg: 61			

Minimum Wage by County: Job Number 1: $15.93/hr. San Diego County;
Job Number 2: $13.28/hr. 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 $3.93 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Administrative Staff 1		18
Administrative Staff 2		3
Information Technology Staff 1		4
Information Technology Staff 2		1
Maintenance & Repair Staff		19
Manager 1		22
Manager 2		15
Manager 3		10
Production Staff 1		283
Production Staff 2		5
Production Staff 3		7
Production Staff 4		2
Sales & Marketing Staff		32
Sales & Marketing Staff		8
Job Number 2 – Job Creation		
Production Staff		98

INTRODUCTION

Taylor-Listug, Inc. dba Taylor Guitars (Taylor Guitars) (www.taylorguitars.com) is a privately owned manufacturer of high-quality acoustic and electric guitars. The Company was founded by Bob Taylor and Kurt Listug in 1974. Customers include major recording and performing stars such as Jewel, Jason Mraz, Taylor Swift, and Zac Brown. The Company is headquartered in El Cajon. It also operates a manufacturing facility in Mexico, a distribution warehouse in the Netherlands, and an ebony mill in Cameroon.

PROJECT DETAILS

Retrainee - Job Creation

In support of job creation, the Panel is offering incentives to companies that commit to hiring new employees. Under the Retrainee-Job Creation program, training for newly-hired employees will be reimbursed at a higher rate, and trainees will be subject to a lower post-retention wage.

Taylor Guitars has been experiencing 10% annual growth the last several years and expects this trend to continue over the next several years. For this proposal, the Company will expand existing business capacity by committing to hire 98 new employees (Job Number 2). The Company's continued growth requires a focus on high-quality, intensive training that will provide workers with the technical skills to perform efficiently at high levels. 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.

Green/Clean Operations

Along with a strong commitment to quality, Taylor Guitars believes that building a guitar begins with a commitment to responsible management of natural resources. The Company is regarded as an industry leader in the areas of environmental stewardship and forestry partnerships.

Taylor Guitars' history of pioneering partnerships is reflected in its long collaborative relationship with GreenWood Global (GreenWood), a non-profit organization that empowers forest communities to support themselves through sustainable forestry practices. The Company's work with GreenWood in Honduras, has fostered a local, shared economy through which several forest communities harvest mahogany to make guitar necks using the small-footprint method of felling one tree at a time to minimize the impact on the delicate balance of the rainforest ecosystem.

Additionally, in Africa, Taylor Guitars owns and operates Crelicam, an ebony mill in Yaoundé, where it has brought its forward-thinking vision to life. The Company's procurement and milling of ebony offers both investment and enrichment to the local community. Its havesting practices ensures that ebony is legally, sustainably and ethically harvested. For this effort, the Company was recognized for the 2014 Award for Corporate Excellence from the U.S. Department of State.

Training Plan

This is Taylor Guitars second ETP project. The first Agreement was completed over 5 years ago. In this proposal, Taylor Guitars will provide training to 429 incumbant and 98 newly-hired trainees in the following skills:

Business Skills (15%): This training will be offered to Administrative Staff, Information Technology, Sales and Marketing and select Managers. Trainees will receive skills to better manage customer relationships and increasingly complex projects and ensure better communication with internal and external customers. In addition, a focus on Export and New Product Development will allow the Company to continue to expand its opportunities for growth.

Computer Skills (10%): This training will be offered to all occupations. Production Staff and Managers will receive ERP and CAD/CAM training to ensure effective use of systems and equipment. Administrative and IT staff will be the focus for Microsoft Office in order to maximize efficiency within their job function and improve their productivity.

Continuous Improvement (10%): This training will be offered to all occupations. Training will help to sustain and enhance the Company's growth potential. Training in teams, problem solving, supply chain optimization, quality systems, six sigma, change management and performance management will help employees establish a continuous improvement mentality and work effectively within their teams and the organization as a whole.

Literacy Skills (5%): This training will be offered to Production Staff in Vocational English as a Second Language to enhance their workplace literacy and ensure that they can effectively participate in and benefit from all other training subjects.

Manufacturing Skills (25%): This training will be offered to Production Staff, Maintenance & Repair Staff and Managers to provide them with the skills to better manage increased production demands, avoid errors, improve problem solving and correct errors when they occur. Inventory and Logistics Management training will reduce inventory issues and ensure greater efficiency between departments. Solder, CNC and related Production Skills training will eliminate errors in the production process and ensure higher quality and output.

Productive Laboratory – Manufacturing Skills (35%)

Trainees may produce goods for profit as part of Productive Lab (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 not exceed 40 hours per trainee, and the trainer-to-trainee ratio will not exceed 1:1.

Because Taylor Guitars manufactures some of the highest-quality guitars on the market today, employees who make these guitars must have the requisite hands-on skills to meet Taylor's exact standards. Most of the PL training will be delivered to the 98 newly-hired trainees. However, some incumbant workers will also receive PL in cross-functional training to broaden their skills to work in new positions within the company.

Workers spend a significant portion of their first 90 days in classroom and hands-on training in order to gain required technical knowledge and skills. Once the initial training has been completed, individuals are assigned to a department and learn additional skills related to that department's specialty. These workers continue learning specialty skills, working in small groups and individually with technical experts in their specialty.

The equipment and machines used in PL include wood binding jigs, drills, saws, boring tools, clamps, cauls, gluing equipment, and sanding and other wood working equipment. Additionally, some trainees who work on electronic components will receive traning in wire cutting, stripping, soldering, winding machinery, and electronic measuring tools. Employees are coached and guided by technical experts in their departments.

Commitment to Training

Taylor Guitars provides job-specific training for employees in skills such as company orientation, guitar making basics, safety, and other job-specific skills. The Company also offers Lean, soft skills, strategic skills, and departmental training as needed. The Company delivers training in a blended learning approach that includes classroom, simulated lab, hands-on coaching and technology-driven methodologies. Annual expenditures for training historically average $270K.

Taylor Guitars 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

In May 2014, Taylor Guitars hired a Director of Training and Development to develop and direct a formalized training program.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

California Manufacturing Technology Consulting (CMTC) assisted with development of this proposal. Note: CMTC is eligible to receive 10% of the approved amount of funding for referrals such as this, under a marketing agreement with ETP, not to exceed $15,000. In this proposal, the fee will be $15,000. This fee does not affect the approved amount of funding.

ADMINISTRATIVE SERVICES

Taylor Guitars also retained CMTC in Torrance 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

- Sales Skills
- Business Writing
- Business Acumen
- Resolving Conflict
- Effective Meeting Skills
- Accounting
- Financial Analysis Skills
- Goal Setting
- Negotiation Skills
- Presentation Skills
- Providing Quality Customer Service
- Time Management
- Global Business and Exporting
- New Product Development

COMPUTER SKILLS

- Enterprise Resource Planning (ERP)
- Word Processing (Intermediate & Advanced Level)
- Spreadsheets (Intermediate & Advanced Level)
- Presentation Software
- Database Management
- CAD/CAM Software Training
- Internal HR Computer Program (Ultipro)

CONTINUOUS IMPROVEMENT

- Teams and Team Building
- Problem Solving
- Communication Skills
- Leading Change
- Lean Manufacturing
- Environmental Management System (EMS) Implementation
- Six Sigma
- Quality Management Systems
- Supply Chain Optimization
- Strategic Planning and Policy Deployment
- Leadership Skills
- Time Management
- Performance Management

MANUFACTURING SKILLS

- Soldering
- Shop Math and Geometric Dimensioning & Tolerancing
- CNC Programming
- Surface Mount Technology: Manufacturing & Rework
- Through Hole Technology: Rework and Repair
- Production Skills

- Writing Standard Operating Procedures (SOPs)
- Quality System Requirements, Good Manufacturing Practices & Inspections
- Quality Inspection
- Manufacturing Logistics Management
- Production and Inventory Management
- Managing Build Loads
- Managing Inventory
- Machine Maintenance
- Material Safety Data Sheets
- Manufacturing Safety
- Fadal Operator Certification
- New Hire – 30 Day Training/Cross Training for Incumbents
    - Body Bind & Sand 1
    - Body Bracing 1
    - Body Assembly 1
    - Side Bending
    - Body Finishing 1
    - Neck Finishing 1
    - Sanding
    - Fitting
    - Gluing
    - Proper Tool Usage (Heat Gun, Hex Driver, Wire Cutter, Wire Stripper, Clamps, End Nippers)
    - Proper Equipment Usage (Winding Machine, , Eyelet Machine, Solder Gun, Access Panel Tester)
- New Hire – 60 Day Training/Cross Training for Incumbents
    - Body Bind & Sand 2
    - Body Bracing 2
    - Body Assembly 2
    - Side Bending
    - Body Finishing 2
    - Neck Finishing & Inspection
    - RFID Scanners
    - Miters
    - Round Over on Binding
    - Haloing
    - Using Jigs to Inspect Correct Alignment
    - Wire & Assembly Testers
    - Identifying Glue Excess
    - Identifying Gaps/Scratches/Dings
    - Identifying Misshapen Soundhole
    - Corrective Action
- New Hire – 90 Day Training/Cross Training for Incumbents
    - Wood Types
    - Repair
    - Spec Sheet
    - Model Identification
    - Laser Machine
    - Side Bending
    - Access Panel Assembly
    - Battery Cable Test
    - RFID scanners

- Miters
- Round Over on Binding
- Haloing
- Using Jigs to Inspect Correct Alignment

LITERACY SKILLS

- Vocational English as a Second Language (VESL)

Productive Lab Hours

0-40

MANUFACTURING SKILLS (1:1 Trainer-to-Trainee Ratio)

- Fadal Operator Certification
- New Hire – 30 Day Training/Cross Training for Incumbents
  - Body Bind & Sand 1
  - Body Bracing 1
  - Body Assembly 1
  - Side Bending
  - Body Finishing 1
  - Neck Finishing 1
  - Sanding
  - Fitting
  - Gluing
  - Proper Tool Usage (Heat Gun, Hex Driver, Wire Cutter, Wire Stripper, Clamps, End Nippers)
  - Proper Equipment Usage (Winding Machine, , Eyelet Machine, Solder Gun, Access Panel Tester)
- New Hire – 60 Day Training/Cross Training for Incumbents
  - Body Bind & Sand 2
  - Body Bracing 2
  - Body Assembly 2
  - Side Bending
  - Body Finishing 2
  - Neck Finishing & Inspection
  - RFID Scanners
  - Miters
  - Round Over on Binding
  - Haloing
  - Using Jigs to Inspect Correct Alignment
  - Wire & Assembly Testers
  - Identifying Glue Excess
  - Identifying Gaps/Scratches/Dings
  - Identifying Misshapen Soundhole
  - Corrective Action
- New Hire – 90 Day Training/Cross Training for Incumbents
  - Wood Types
  - Repair
  - Spec Sheet
  - Model Identification
  - Laser Machine
  - Side Bending
  - Access Panel Assembly
  - Battery Cable Test
  - RFID Scanners
  - Miters

- Round Over on Binding
- Haloing
- Using Jigs to Inspect Correct Alignment

Literacy Training cannot exceed 45% of total training hours per trainee.
Safety Training will be limited to 10% of total training hours per trainee.

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

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Ventura Foods, LLC

Agreement Number: ET16-0135

Panel Meeting of: August 28, 2015

ETP Regional Office: San Diego **Analyst:** S. Godin

PROJECT PROFILE

Contract Attributes:	Priority Rate	Industry Sector(s):	Manufacturing Priority Industry: ☒ Yes ☐ No
Counties Served:	San Bernardino, Orange	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☒ Yes ☐ No Teamsters Local Union #630		
Number of Employees in:	CA: 675	U.S.: 2,771	Worldwide: 2,776
Turnover Rate:	7%		
Managers/Supervisors: (% of total trainees)	9%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$324,000		$0	$0		$324,000

In-Kind Contribution:	100% of Total ETP Funding Required	$359,820

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, Continuous Improvement, HazMat, Manufacturing Skills, OSHA 10/30	450	8-200	0	$720	$14.30
				Weighted Avg: 40			

Minimum Wage by County: San Bernardino County: $15.07 (Collective Bargaining Agreement wages of $14.30 per hour are deemed to meet ETP post-retention wage requirements.)
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 Wages.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Production Personnel (Line Operator, Mixer/Blender, Packer/Stacker, Spicer)		190
Maintenance Mechanic		21
Forklift Operator, Warehouse/Distribution Staff		90
Quality Technician		21
Sanitarian Staff		28
Administrative Support Staff		20
Foreman		40
Manager/Supervisor		40

INTRODUCTION

Ventura Foods, LLC (VFL) (www.venturafoods.com) was formed in 1996 as a joint venture between CHS, Inc. and Mitsui & Company, LTD. Headquartered in Brea, the Company manufactures food condiments such as margarine, mayonnaise, salad dressings, sauces, shortenings, soup bases, and cooking oils at 11 manufacturing facilities. VFL's products are sold to food service distributors, retail, and private-label and industrial channels, both in the United States and internationally. Twenty percent of VFL's products are manufactured and shipped from its Ontario facility; the sole location of the proposed ETP funded training. VFL meets out-of-state competition standards as an industrially classified manufacturer and is eligible for priority industry reimbursement.

All occupations in this proposal, with the exception of Administrative Support Staff, are represented by the United Brotherhood of Teamsters, Local Union No. 630. A union letter of support for the proposed training has been provided.

PROJECT DETAILS

This is VFL's second ETP Agreement, the previous being over five years ago. The emphasis in this training proposal is on the companywide implementation of two software programs: the JD Enterprise One, Version 9.1 (ERP) and a Human Capital Management (HCM) software system. Both systems replace older in-house legacy systems.

The new ERP system will improve the Company's overall productivity, link operations across all departments, and provide real-time lot tracking and inventory control. The HCM system provides management with tools to track employee health benefit and beneficiary information; employee training and development tracking; and historical wage compensation information.

Training on both software systems is scheduled to commence in September. The JD Enterprise One system has an implementation (go-live) date of January 2016. The HCM system will go live during the second quarter of 2016.

VFL has also identified the need to increase operating efficiencies and its manufacturing capacity by building high performance work teams, which will provide faster resolutions for its customers. Additional foodservice and retail packaging lines are being added to support newly purchased mayonnaise and margarine processing equipment. Production Personnel and Warehouse/Distribution Staff will need to streamline operations in order to increase production output, shorten delivery times, and reduce errors. Implementation of standard operating procedures will insure compliance to strict sanitization processes and regulations.

Training Plan

The majority of the training will be delivered by in-house staff, with a smaller portion conducted by outside training vendors yet to be determined.

Computer Skills (25%): Training on the JD Edwards Enterprise One Version 9.1 system will be provided to all occupations as it relates to individual job functions. The ERP training will provide trainees with the skills to navigate the software; thus reducing errors and rework, and improve inventory and production management to meet increased customer demands. Managers and select Administrative Support Staff will be trained on the new HCM system, which will enhance management and operational efficiency through easier access to actionable information.

Continuous Improvement (25%): Trainees in all occupations will receive training in team building, leadership, and quality concepts. Training in Six Sigma and process improvement will help workers standardize processes, control quality, and improve efficiencies. Team building and problem solving will lead to improved operations and promote enhanced interactions with both internal and external customers.

Production Staff and selected Managers/Supervisors will also receive training in Safe Quality Food 2000 (SQF 2000) and Hazardous Analysis and Critical Control Points (HACCP). SQF 2000 is an internationally recognized system that provides verifiable assurance that the Company's products have been produced in accordance with all SQF standards. HACCP is a food safety management system that achieves its function through the analysis and control of biological, chemical, and physical hazards from raw material production, procurement and handling to manufacturing and distribution of the finished product.

Manufacturing Skills (30%): Production Personnel, Managers and Supervisors will receive training in new equipment operations, maintenance and troubleshooting. Standard operating procedures will be developed and applied to each piece of equipment. Good Manufacturing Practices (GMP) will reduce waste, improve quality, and lengthen the life of the equipment.

Hazardous Materials (10%) Production Staff, Managers, and Supervisors who work with hazardous materials will receive skills training in hazardous waste/spill operations, emergency response protocol, and proper completion of material safety data sheets.

Certified Safety Training

OSHA 10/30 (10%): This training is a series of courses "bundled" by industry sector and occupation. It consists of 10 hours of classroom training for frontline Production Personnel and 30 hours for Foremen, Supervisors, and Managers. The coursework is geared to manufacturing, and also construction. 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. This training provides a complete overview of occupational safety and health so that workers are more knowledgeable about workplace hazards.

Commitment to Training

VFL provides basic on-boarding training for all newly hired employees. Training consists of basic orientation and an overview of company policies and procedures. Informal on-the-job training is provided to Production and Warehouse Distribution Staff on an as needed basis. The training is provided by in-house staff. The annual training budget for VFL's Ontario plant is $16,000.

ETP funds will not displace the existing financial commitment to training. Basic 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 conducted by in-house trainers who will collect training rosters after each training session. An in-house Administrative Support Staff person will forward scanned roster copies to VFL's subcontracted project administrator (ADP) for data entry on the ETP tracking system. ADP will perform ETP administrative recordkeeping duties. All training will be delivered to Ontario employees; however, training records will be kept at VFL headquarters in Brea. Employees at the Brea location will not participate in ETP-funded training.

Impact/Outcome

Training goals include new technologies, manufacturing skills, and continuous improvement skill sets necessary to remain competitive and provide career opportunities for employees to grow within the organization as VFL moves to a high performance workplace.

PRIOR PROJECTS

VLF has not had an ETP Agreement within the last five years.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

VFL retained ADP, LLC in San Dimas 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:

COMPUTER SKILLS

- JD Edwards Enterprise One Version 9.1 Software Skills
- Human Capital Management Solutions Software Skills

CONTINUOUS IMPROVEMENT

- Lean Concepts
- Six Sigma (define, measure, analyze, improve, control)
- 5-S Principles (Sort, Set in Order, Sanitize, Standardize, Sustain)
- Leadership Skills
- Problem Solving and Decision Making
- Building High Performing Teams
- Process Improvement
- Quality Concepts
- Safe Quality
  - SQF 2000
  - HACCP

HAZARDOUS MATERIALS

- Hazardous Materials Handling & MSDS Documentation
- Registration, Evaluation, Authorization and Restriction of Chemical substances
- Ammonia Training
- Emergency Response Protocol & Clean Up

MANUFACTURING SKILLS

- Equipment Operations and Maintenance
- Standard Operating Procedure Training
- Trouble Shooting Equipment and Processes
- Good Manufacturing Practices (GMP)

OSHA 10/30 (Certified OSHA Instructor)

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

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

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

Food, Industrial and Beverage Warehouse, Drivers
and Clerical Employees Union - Los Angeles and Vicinity

(213) 627-2178
Fax (213) 627-0846

Teamsters Local Union No. 630

750 S. Stanford Avenue / Los Angeles, California 90021-1416

Ernest Lopez
Secretary Treasurer

Xavier Sandoval
President

April 21, 2015

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

Dear Panel Members,

The Teamsters Local Union No. 630, affiliated with the International Brotherhood of Teamsters, fully supports Ventura Foods, LLC's proactive approach in pursuing ETP-Funding for training purposes. We support the training proposal being submitted to the Employment Training Panel by Ventura Foods, LLC.

Today's competitive and demanding markets for Ventura Foods, LLC products require modern technology, well trained employees, and thoughtful leadership. Ventura Foods, LLC's request for these training funds support these important needs for all of us to be successful.

Please feel free to contact me regarding the above letter of support at (213) 627-2178

Sincerely,

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

RETRAINEE - JOB CREATION

Critical Proposal for:

BioMarin Pharmaceutical Inc.
Agreement Number: ET16-0152

Panel Meeting of: August 28, 2015

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

PROJECT PROFILE

Contract Attributes:	Critical Proposal Retrainee Job Creation Initiative Priority Rate	Industry Sector(s):	Manufacturing Biotechnology/Life Sciences Priority Industry: ☒ Yes ☐ No
Counties Served:	Marin	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 1,500	U.S.: 2,000	Worldwide: 2,500
Turnover Rate:	7%		
Managers/Supervisors: (% of total trainees)	6%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$900,000		$56,700 15%	$0		$843,300

In-Kind Contribution:	100% of Total ETP Funding Required	$1,530,750

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	Continuous Improvement, Business Skills, Computer Skills, Advanced Technology, Manufacturing Skills, PL-Mfg.	700	8-200	0-100	$459	$18.60
				Weighted Avg: 30			
2	Retrainee Job Creation Initiative Priority Rate	Continuous Improvement, Business Skills, Computer Skills, Advanced Technology, Manufacturing Skills, PL-Mfg.	435	8-200	0-100	$1,200	$18.60
				Weighted Avg: 60			

Minimum Wage by County: Job Number 1: $16.44 per hour for Marin County;
Job Number 2 (Job Creation): $13.70 per hour Marin 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 the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Production Worker/Operator		600
Engineer		300
Scientist		70
Administrator		101
Manager/Supervisor		64

Critical Proposal

This proposal for BioMarin Pharmaceutical Inc. (BioMarin) has been designated a Critical Proposal by the Governor's Office of Business and Economic Development based on the Company's planned expansion and commitment to adding new jobs in California.

INTRODUCTION

Founded in 1997, BioMarin (www.biomarin.com) is headquartered in San Rafael and has its manufacturing facilities in Novato. BioMarin develops and manufactures pharmaceuticals for rare but serious autoimmune and inherited metabolic diseases. The Company specializes in the development and production of medications targeted for populations of 200,000 patients or fewer.

The Company's FDA-approved products include Naglazyme, Aldurazyme, Kuvan, and Firdapse. Naglazyme and Aldurazyme are used to treat patients with MPS, a debilitating, life-threatening genetic disease for which no other drug treatment currently exists. Kuvan treats an inherited metabolic disease that affects at least 50,000 diagnosed patients under the age of 40 in the developed world. Firdapse treats patients with LEMS, which is a rare autoimmune disease with the primary symptoms of muscle weakness.

The Company proposes to train 700 currently employed, frontline employees and 435 newly-hired, frontline workers. Training and hiring will occur both in Novato and San Rafael. This is BioMarin's second ETP project. Any Incumbent workers in Job Number 1 trained under a previous Agreement will receive different training courses based on new technology, processes, and equipment. Due to the complexity of manufacturing its products, it is critical that BioMarin be able to manufacture drug products at a scale large enough to support their respective commercial markets. This ETP-funded training will assist BioMarin to remain competitive globally, meet the demands of expanding markets, and retain its manufacturing workforce in California.

Retrainee - Job Creation

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

To meet future commercial and clinical product needs, manufacturing operations will expand to meet long-term anticipated demand. Infrastructure improvements at the Novato manufacturing facility include adding a cell culture and fermentation capacity to support seven clinical and commercial biological products. BioMarin is also building a new three-story, 85,000-square-foot research and development facility in San Rafael. This San Rafael facility is set to open in late 2015. In addition, BioMarin invested over $300 million in research and development in 2014 resulting in the creation of a robust pipeline of new products.

In this proposal, BioMarin has committed to hiring 435 new employees over the next two years, largely in production but potentially across all occupations. The date-of-hire for all trainees will be within the three-month period before contract approval or within the term-of-contract. The Company also represents that these trainees will be hired into "net new jobs" as a condition of contract.

PROJECT DETAILS

BioMarin is requesting the Panel's assistance to provide classroom/laboratory, computer-based training (CBT), and Productive Lab (PL) training hours in the following areas:

Continuous Improvement Skills (14%): Training in Quality Master Plan will provide trainees across occupations with skills to make significant improvements in: quality, decision-making, corrective and preventative actions, management controls, process validation, and compliance

management. This training will also enable employees to reduce costs, work in teams, lead teams, improve productivity, and find root causes of problems.

Computer Skills (3%): Trainees in all occupations may receive training in advanced desktop applications, computer-assisted design software, productivity software applications, and BioMarin's in-house software applications for inventory, account management, and manufacturing control. All basic desktop training such as Microsoft Word, Excel, and PowerPoint will be delivered at BioMarin's own expense.

Business Skills (2%): Training will be provided to personnel interacting with customers (primarily Administrators) and to Supervisor/Managers. Classes will include project management; marketing; communications; finance; and preparing effective oral and written presentations to customers. FDA regulations, including the complexity of BioMarin products and business transactions, dictate that effective customer communications and order accuracy be achieved.

Manufacturing Skills (5%): Training will be provided to frontline Production Workers and Operators who need to operate specialized equipment used in BioMarin's production facilities. Trainees will also learn cross-functional production skills to use several different pieces of equipment and manufacturing assembly techniques. Manufacturing skills training (class/lab and PL) will be taught by a combination of highly skilled internal production supervisors, chemists, scientists, production trainers, production associates and/or engineers. These instructors will oversee an employee's use of special biotech equipment, which will provide the employee highly transferable skills to other biotech employers.

Advanced Technology (10%): Training will be delivered to Engineers and Scientists in the following: bio-analytical, sterility, and stability testing; DNA/Viral filtration theory; cell culture, fermentation, harvest, and purification; microplasma and in vitro testing; cell culture density and operations; and other advanced bioscience topics. This type of training, entirely provided by in-house and external trainers, will cost more than $100 per trainee hour. Trainees slated to receive training have previous training and experience in biotechnology and/or electronic technology measurement but lack specific skills in new product technologies, equipment, and processes. The trainer-to-trainee ratio will be capped at 10 trainees to one instructor to allow in-depth coverage and personal attention from the instructor.

PL-Manufacturing Skills (66%)

Only frontline manufacturing employees, including Production Workers employed as Operators who directly interface with a new and/or improved manufacturing process, will attend PL training. The proposed PL training will provide manufacturing employees cross-training opportunities on the many production lines/procedures used throughout the manufacturing facility. Rather than create live classroom training sessions for each new standard, BioMarin is using PL training as the most logical alternative to deliver the substantial quantity of critical manufacturing skills to its frontline manufacturing workers.

The projected number of employees who will attend productive lab training is 600. Each trainee will receive an average of 47 PL training hours, not to exceed 60. This training methodology is needed for the newly hired trainees in Job Number 2 but will also be a significant training methodology for production workers in Job 1 because of the nature of its manufacturing business and its focus on training frontline workers on the manufacturing floor. The Company's Novato facility must demonstrate compliance with Good Manufacturing Practices (GMPs) to the satisfaction of the FDA, the European Commission (EC) and health agencies in other countries for the commercial production of Aldurazyme, Naglazyme and Vimizim. To sustain GMP status, BioMarin is subject to periodic inspections confirming compliance with applicable law and must

pass inspection before drug protection and sales. A major compliance review item is the competency of worker skills operating the biotech machines throughout BioMarin's clean room facilities. All PL training will occur in a cleanroom manufacturing setting, conducted by a qualified trainer. During ETP-funded training, the trainer's time will be dedicated to the delivery of PL to the trainee. The trainer-to-trainee ratio is 1:1. These parameters meet the Panel's standards for PL training. This training will provide specific bio-tech manufacturing skills on the latest machines, tools, and techniques to produce FDA-regulated products. A trainee observes real production procedures demonstrated by the lab trainer and will practice their skills under the supervision of the lab trainer. Upon certification of their competency, the trainee is able to independently produce goods that are for sale.

PL training certificates and attendance records are stored in PDF format in the Learning Management System (LMS) using ComplianceWire software. The course content is also stored in LMS along with individual training plans.

Impact/Outcome

The majority of the training under this proposal will be delivered to frontline manufacturing workers who will be trained to use state-of-the-art biotech machines, tools, and techniques in a clean room environment. BioMarin representatives report that the life sciences industry is the most regulated in the State, and trainees who are knowledgeable in performing their job to the current manufacturing operating procedures acceptable under FDA standards attain highly transferable skills.

Trainees will receive certifications in such areas as: Quality Control, Biochemistry, Operation and Maintenance of VITEK 2, Glassware Wash Process, Swab Sampling, HVAC Sampling, Single Use Bioreactor, Tubing Welder, Freezing of Microorganisms, Bioburden Testing, Endotoxin, Validation of Microbial Recovery, Buffer Preparation, Processing of Samples for Microbial Identification and others depending on work order requirements.

Commitment to Training

ETP funds will not displace BioMarin's existing financial commitment to training. The Company's statewide training expenditures in California for non-ETP related training is in excess of $1,300,000. Further, the proposed ETP-funded training is different in content and format than the Company's ongoing training. The proposed customized ETP curriculum will build on, but not overlap, basic instruction and orientation training already provided by the Company.

BioMarin currently funds all training in OSHA and FDA-mandated safety regulations; rudimentary job skills; basic desktop training in Microsoft Word, Excel, and PowerPoint; and executive development. BioMarin will continue to fund such training, and any training hours delivered beyond the 200 hours per trainee cap in this project. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

Recordkeeping

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

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET13-0209	Novato	11/26/12–11/25/14	$457,920	$452,822 (99%)

DEVELOPMENT SERVICES

Herrera & Company, of Stockton, provided application development services at no cost.

ADMINISTRATIVE SERVICES

Herrera & Company will also perform administrative services for an amount not to exceed 13% of payment earned.

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours
8-200

CONTINUOUS IMPROVEMENT SKILLS

- Process Modeling and Analysis
- Good Laboratory Practices
- GxP Compliance Training
- Quality Fundamentals/Core Skills
- Leadership / Coaching Skills
  - Facilitating Groups
  - Efficiency Workflow
  - Facilitation Skills and Mentorship
  - Strategic Sales Negotiation Techniques

BUSINESS SKILLS

- Project Management
- Master Scheduling Presentation
- Product Knowledge and Market Validation
- Finance and Accounting Skills
- Marketing Promotion and Position

COMPUTER SKILLS

- Management and Manufacturing Control Systems
- Materials and Logistics Software Development
- Advanced Desktop Applications
- Programming Languages
- Project Management Software Tools
- Operating System Programming Language

ADVANCED TECHNOLOGY

- Cell Data Modeling and Architecture
- Advanced Programming Development Applications
- Application Bioscience Engineering
- Factory Automation Tools and Techniques
- Instrument Modeling/Integration Software Development
- Measurement Biosciences Practice and Theory

MANUFACTURING SKILLS

- Production and Equipment Operations
- Manufacturing Process Cross Training
- Machine Operations, Calibration, and Maintenance

Productive Lab Hours

0 - 60

MANUFACTURING SKILLS (1:1 Ratio)

- Production and Equipment Operations
- Manufacturing Process Cross Training
- Machine Operations, Calibration, and Maintenance
- 125 ml, 500ml Shaker Flask Inoculation
- Assembly, Compression and Filter Flush Millipore Pod System
- Automated SIP of Equipment Using SCADA
- Butyl Strip through Storage
- Butyl Washes (Wash 1 to Wash 2)
- Charcoal Filtration of UF Concentrate
- Cleaning & Maintenance of Hoses in Galli West Mfg. Facility
- Determination of Cell Density & Viability During Cell Culture
- Equipment Flow for Kitting and Sampling Room at Pimentel
- Execution of Oracle EBS for Commercial Manufacturing
- Expansion to 1/3/8 L Flasks
- Final Filtration of UF Concentrate
- Gowning & Equipment Flow for Kitting & Sampling Room at Pimentel
- HiCap Washes (Wash 1 to Wash 2)
- In-Process Sampling for rhIDU Production
- Material, Equipment & Process Flow for Galli East Non-MFG Staff
- Navigation to Control Windows
- Operation & Preventative Maintenance of the QC Fume Hoods
- Operation & Maintenance of the Adv. MicroOsmometer 3300
- Operation & Maintenance of the Beckman 350 pH Meter
- Operation & Maintenance of the Bellco Spinner Plate
- Operation & Maintenance of the DU 730 UV/Vis
- Operation and Maintenance of the pH/Conductivity Meter
- Operation and Maintenance of the Sartorious Sartocheck 3 Integrity Tester Including Filter Usage and Testing
- Preparation of Snap Frozen HCCF Samples for Mycoplasma Production Media Preparation Using VE-2200 and VE-2210
- QC Accessioning
- Recalibration of Probes
- Sampling Post-DNA/Viral Filtration
- Barcode Gun Scanner for EBS Transactions for Commercial Mfg.
- Viable Air Monitoring Using the Settling Plate Method
- Washout/ Perfusion and Harvest Collection

- WFI Drops Sanitization and Usage
- Working Cell Bank Distribution
- Zinc Elution and Adjustment

CBT HOURS	**COMPUTER-BASED TRAINING (CBT)***
0 - 100	

Computer Skills

- Management and Manufacturing Control Systems (1 hr)
- Single-Vendor Enterprise Resources Planning (1 hr)
- Customer Relationship Management Systems (1 hr)
- Advanced Desktop Applications (2 hr)

Business Skills

- Customer Communications and Awareness (1 hr)
- Sales and Negotiation Skills (1 hr)
- Finance and Accounting Skills (1 hr)
- Marketing Promotion and Position (2 hr)

Continuous Improvement

- Quality Management Systems (QMS) Procedures (1 hr)
- Manufacturing Quality and Reliability (1 hr)
- Process and Capability Mapping (1 hr)
- Problem Solving Tools and Techniques (1 hr)

Manufacturing Skills

- Production System Procedure Review (0.5 hr)
- Manufacturing Procedures and Protocols (1 hr)
- Machine Instrumentation and Troubleshooting (1 hr)

*An Excel list will be provided to ETP with CBT course titles and standard times per module. The list includes codes which will correspond to the CBT topics listed above. CBT will be capped at 50% of total training hours per trainee.

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

RETRAINEE - JOB CREATION

Critical Proposal for

Cepheid

Agreement Number: ET16-0148

Panel Meeting of: August 28, 2015

ETP Regional Office: San Francisco Bay Area **Analyst:** A. Nastari

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative Critical Proposal	Industry Sector(s):	Manufacturing Biotechnology/Life Sciences Priority Industry: ☒ Yes ☐ No
Counties Served:	San Joaquin, Santa Clara	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☐ Yes ☒ No		
Number of Employees in:	CA: 900	U.S.: 1,100	Worldwide: 1,560
Turnover Rate:	10%		
Managers/Supervisors: (% of total trainees)	3%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$569,640		$0	$0		$569,640

In-Kind Contribution:	100% of Total ETP Funding Required	$633,647

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	Continuous Improvement, Business Skills, Computer Skills, Manufacturing Skills, PL-Manufacturing	403	8 - 200	0	$1,080	$15.70
				Weighted Avg: 60			
2	Retrainee Priority Rate Job Creation	Continuous Improvement, Business Skills, Computer Skills, Manufacturing Skills, PL-Manufacturing	84	8 - 200	0	$1,600	$15.07
				Weighted Avg: 80			

Minimum Wage by County: San Joaquin - $15.07; Santa Clara - $16.44

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

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

Up to $4.63 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job 1		
Engineers		4
Leads		9
Production Workers		360
Supervisors		16
Technicians		14
Job 2		
Engineers		3
Leads		1
Production Workers		75
Supervisors		2
Technicians		3

CRITICAL PROPOSAL

This proposal has been designated as a "Critical Proposal" by the Governor's Office of Business and Economic Development (GO-Biz) as they are expanding facilities in California. In this proposal, Cepheid seeks ETP funding to train 403 currently employed and 84 new employees.

INTRODUCTION

Cepheid, www.cepheid.com, founded in 1998 and based in Sunnyvale, is a molecular diagnostics company that develops, manufactures and markets integrated testing systems for the clinical and non-clinical market. Cepheid's testing systems enable rapid, sophisticated molecular testing for organisms and genetic-based diseases by automating otherwise complex manual laboratory procedures.

Cepheid operates two California facilities: Sunnyvale is where assembly of systems, production of reagents, and tests for use on GeneXpert and SmartCycler system are conducted. Lodi, established in 2012 is where the assembly of its disposable molecular testing/reaction tubes and cartridges occurs. This proposal addresses training needs at both facilities.

Cepheid's testing systems were used after the 2001 anthrax attacks which produced rapid, accurate bio-detection field units based on DNA analysis. Since those attacks, the United States Postal Service has used Cepheid's instruments and technology to screen U.S. mail for possible Anthrax contamination. Federal agencies also use Cepheid machines to detect the spreading of anthrax contamination and to identify its possible sources. Today, Cepheid's GeneXpert system is designed for a broad range of user types from reference laboratories and hospital central laboratories to satellite testing locations including emergency departments and intensive care units within hospitals, as well as physician offices and other alternate site laboratories.

Cepheid expects that due to its ability to deliver accurate and rapid results, ease of use, flexibility and scalability, its GeneXpert system will continue to significantly expand its presence in the clinical market. Cepheid continually invests in its plant and equipment, but needs to maintain a well-trained and highly skilled manufacturing workforce to meet expected demands.

PROJECT DETAILS

Company Growth

Cepheid's growth objective for its California facilities is to develop essential clinical diagnostic products for its GeneXpert system. Cepheid invested over $95 million in research and development in 2014 confirming its commitment to California and its business strategy. Cepheid focuses its efforts on four main areas:

- Evaluate product development efforts to design, improve and produce specific tests; expand product offering to customers
- Chemistry research to develop innovative testing methods
- System engineering to extend capabilities
- Target discovery research for development of future analyses.

This is Cepheid's first ETP project. Cepheid proposes to train 403 currently employed, front-line workers and 84 newly-hired, front-line manufacturing workers at its Sunnyvale and Lodi facilities.

Retrainee - Job Creation

In support of job creation, the Panel is offering incentives to companies that commit to hiring new employees. Training for newly-hired employees will be reimbursed at a higher rate and trainees will be subject to a lower post-retention wage.

Cepheid has committed to hiring 84 new employees. The date-of-hire for all trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into “net new jobs” as a condition of contract.

To address its California business growth objectives, Cepheid will add 84 additional positions in existing occupations over the next two years. In 2013, Cepheid hired 140 full-time workers and 205 in 2014. Therefore, the proposed hiring of 84 new workers is within the Company’s realistic hiring goals.

Cepheid projects to hire approximately 54 workers at its Sunnyvale facility and 30 workers for its Lodi facility. Both facilities can accommodate the additions; however, it is in the process of expanding the Lodi facility. That expansion will be completed in the fall of 2016.

Training Plan

To successfully meet its goals, Cepheid must have an experienced, well trained, workforce that can understand and follow specific quality protocols and manufacturing procedures. Cepheid is requesting the Panel’s assistance to provide 8-200 Class/Lab, CBT, and Productive Lab (PL) training hours in the following areas:

Business Skills (5%): Engineers and Supervisors will receive training in technical writing, project management, marketing, communication, finance, and preparing effective oral and written presentations to customers. Workers must effectively communicate FDA regulations, the complexity of Cepheid’s products and business transactions, and essential accuracy when placing product orders. Engineers and Supervisors who meet with customers and suppliers will receive training in presentation skills, product knowledge, project management, and related professional development skills.

Computer Skills (5%): Cepheid has been implementing a state-of-the art Manufacturing Execution System (MES) that will scale with the project growth of the Company. The MES manages and monitors work-in-process on the factory floor. It keeps track of all manufacturing information in real time, receiving up-to-the minute data from robots, machine monitors and employee status. Engineers, Technicians, Leads, Supervisors, and Production Workers will receive training in technical skills development, functional skills, and specific MES Software skills.

Engineers, Technicians, Leads, and Supervisors will complete training in desktop applications, such as advanced levels of computer assisted design (CAD) software, advanced desktop applications, and in-house productivity applications used for inventory, account management, and manufacturing control.

All basic desktop training such as Microsoft Word, Excel, and PowerPoint will be delivered at Cepheid’s own expense.

Continuous Improvement (10%): All occupations will receive training in Quality, Leadership, Process Analysis, Problem Solving and Statistical Process Control skills to ensure process ownership carries through to the end user. Training will also include “Lean” processes for improvement in productivity and quality by identifying and eliminating waste from the value stream. All trainees will receive training in cost reduction, effective team member skills, and the

use of tools to identify root causes of problems. Leads and Supervisors may also receive Six Sigma courses.

Manufacturing Skills (20%): Cepheid's facilities and manufacturing processes are designed to comply with the quality standard set by the International Organization for Standardization and the FDA's Quality System Regulations. In its manufacturing facilities, Production Operators assemble systems and produce reagents and tests for use on in the GeneXpert systems. Cepheid's customized automated assembly lines have expandable capacities, essential for the assembly of its disposable reaction tubes and cartridges.

Production Operators, as well as Engineers, Technicians, Leads, and Supervisors require cross-functional production skills on manufacturing equipment operation and assembly techniques. Cepheid's manufacturing processes are complex, requiring a high degree of accurate measuring processes, clean-room equipment operations, and specialized handling and assembly of testing systems. Training in Manufacturing skills will be taught by highly skilled, internal production supervisors, chemists, scientists, technicians, production trainers, production associates and/or engineers. The instructors will oversee an employee's use of Cepheid's proprietary biotech equipment.

Productive Laboratory

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

PL-Manufacturing Skills (66%)

Cepheid will train Supervisors and front-line Production Workers, Technicians, Engineers and Leads in PL-Manufacturing skills. These trainees are directly impacted by new and/or improved manufacturing processes. The proposed PL cross-training and new skills will consist of several production lines/procedures used throughout the manufacturing facility both within the clean room manufacturing and in a non-clean room manufacturing area. PL Manufacturing Skills will be specific to Cepheid's biotech machines, equipment, tools, and techniques to produce FDA regulated products. This is critical because the manufacture of Cepheid's products is a highly complex process due in part to strict regulatory requirements imposed by the FDA and other foreign regulatory agencies where products are sold. To be successful, the Company must have an experienced, well-trained manufacturing workforce across all occupations that can understand and follow specific quality protocols and manufacturing procedures, while working efficiently, and adhering to the high work standards required by the biotech industry.

Due to the critical nature of Cepheid's processes, it is essential that most processes are delivered at a 1:1 Trainer-to-Trainee ratio in a Productive Lab environment so that specialized and experienced trainers are able to independently focus on a trainee's skills, ensuring precautious measures are followed. Rather than create live classroom training sessions for each process, PL Manufacturing is the most logical alternative to deliver the substantial quantity of critical manufacturing skills to front-line manufacturing workers including supervisors. All PL training will occur on the factory floor and will be conducted by internal qualified trainers. During ETP-funded training, the trainer's time will be solely dedicated to the delivery of PL. Less than 10% of the total PL delivered may have a ratio of 1:3, and only when new hires are learning a workstation and/or aggressive cross training is required to meet customer requirements.

Cepheid projects each employee will receive PL-Manufacturing Skills, including newly hired workers in Job 2. Each tainee will receive an average of 42 PL hours, not to exceed 60.

Cepheid informs ETP staff that productive lab competency procedures are available for ETP's review upon request.

Impact/Outcome

The majority of the training under this proposal will be delivered to frontline manufacturing workers who will be trained to use state-of-the-art biotech machines, tools, and techniques in a clean room environment. Many production trainees will become certified in welding and injection molding for plastics. As trainees progress through the proposed Manufacturing Skills curriculum, each individual will attain documented certification of competency for each significant manufacturing tool and/or procedure they learn.

Commitment to Training

ETP funds will not displace Cephied's existing financial commitment to training. The company's statewide training expenditures in California for non-ETP related training is in excess of $1,000,000. The proposed ETP-funded training is different in content and format from the company's ongoing training. The proposed customized ETP curriculum will build on, but not overlap, basic instruction and orientation training already provided by the Company.

Cepheid currently funds all training in OSHA and FDA-mandated safety regulations; sexual harassment prevention; rudimentary job skills; basic desktop training in Microsoft Word, Excel, and PowerPoint; and executive development programs. Cepheid will continue to fund such training and all training hours delivered over 200 hours will be at its own expense. The resources provided by ETP will supplement Cepheid's training budget by helping the Company to further its efforts to deliver more and better quality training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

Training Infrastructure

Beginning in January 2014, Cepheid's management team invested in centralizing and formalizing its workforce training efforts. The Company analyzed its training needs and updated its internal training tracking procedures. Cepheid's internal training department will work directly with Herrera & Company to administer the training ETP training contract. The Company expects to start training within 7 days after Panel approval.

High Unemployment Area

Trainees in Job Numbers 1 and 2 may work in Lodi, a High Unemployment Area (HUA), a region with unemployment exceeding the state average by at least 8.1%. The Company's location in San Joaquin County qualifies for HUA status under these standards.

- Wage Modification

For these trainees, the Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. However, Cepheid is not asking for a wage modification.

<u>RECOMMENDATION</u>

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Cepheid retained Herrera & Company in Stockton, to assist with development of this proposal for a flat fee of $8,750.

ADMINISTRATIVE SERVICES

Herrera & 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 Trainees may receive any of the following:

BUSINESS SKILLS

- Project Management
- Presentation Skills
- Influencing Others
- Product Knowledge and Market Validation
- Finance and Accounting Skills
- Marketing Promotion and Position

COMPUTER SKILLS

- Management Execution Software (MES) Systems
- Materials and Logistics Software Development
- Database and Technology
- Desktop Applications (not including Microsoft Office basics)
- Project Management Software
- Internal Corporate Systems and Communications

CONTINUOUS IMPROVEMENT SKILLS

- Lean Manufacturing
- Six Sigma
- Process Modeling and Analysis
- Good Laboratory Practices
- Problem Solving
- Statistical Process Control
- Blueprint Reading
- GxP Compliance Training
- Quality fundamentals/core skills
- Leadership / Coaching Skills
  - Facilitating Groups
  - Efficiency Workflow
  - Facilitation Skills and Mentorship
  - Strategic Sales Negotiation Techniques

MANUFACTURING SKILLS

- Production and Equipment Operations
- Manufacturing Process Cross Training
- Machine Operations, Calibration, and Maintenance
- Mold Setter Skills
- Hydraulic Pneumatic Operations
- Basic Electrical, Welding, and HVAC
- Routsis On-Line Training
- Tools Training: Drill Press, Lathes, Milling, Grinders
- Computer Numerical Controls Machines (CNC)

Productive Lab Hours

0-60

MANUFACTURING SKILLS (1:3 RATIO)

- Clean-room Environment
  - Production and Equipment Operations
  - Manufacturing Process Cross Training
  - Machine Operations, Calibration, and Maintenance
  - Mold Setter Skills
  - Hydraulic Pneumatic Operations
- Basic Electrical, Welding, and HVAC
- Routsis On-Line Training
- Tools Training: Drill Press, Lathes, Milling, Grinders
- Computer Numerical Controls Machines (CNC)

* Cotractor will provide ETP with a comprehensive list of productive lab course titles including codes that correspond to the PL topics listed above.

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:

Triage Consulting Group

Agreement Number: ET16-0139

Panel Meeting of: August 28, 2015

ETP Regional Office: San Francisco Bay Area **Analyst:** L. Lai

PROJECT PROFILE

Contract Attributes:	Job Creation Initiative Retrainee	Industry Sector(s):	Services Priority Industry: ☐ Yes ☒ No
Counties Served:	San Francisco	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 332	U.S.: 466	Worldwide: 466
Turnover Rate:	5%		
Managers/Supervisors: (% of total trainees)	9%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$473,540		$0	$0		$473,540

In-Kind Contribution:	100% of Total ETP Funding Required	$885,550

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, Mgmt. Skills	298	8 - 200	0	$1,410	$22.00
				Weighted Avg: 94			
2	Retrainee Job Creation Initiative	Business Skills, Computer Skills	23	8 – 200	0	$2,320	$22.00
				Weighted Avg: 116			

Minimum Wage by County: Job Number 1: $16.44 per hour for San Francisco County; Job Number 2 (Job Creation): $13.70 per hour 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	
		Job #1 (Retrainee)	**Job #2 (JC – Retrainee)**
Analyst		53	12
Associate		140	11
Sr. Associate		75	0
Manager		30	0

INTRODUCTION

Founded in 1994 and headquartered in San Francisco, Triage Consulting Group (Triage Consulting) offers client hospitals a comprehensive payment review service. The Company provides clients a complete payment review based on their contracts with payers (commercial health plans, PPO networks, Tricare, Medicare, Medicaid, and Workers Compensation). Billing review ensures accurate and all-inclusive payments for services provided. Triage Consulting has over 600 clients throughout the U.S.

PROJECT DETAILS

With the complexity of healthcare billing and insurance payments, along with ever-changing insurance and healthcare regulations, the Affordable Care Act, and ICD-10 in-patient coding, the possibility of billing errors are extremely high. Much of the Company's staff is made up of recent college graduates for whom this is their first professional job. Approximately 75% of Triage Consulting's workforce has been with the Company for less than four years and the Company estimates that it takes over four years of training and experience to become a skilled worker and meet client needs. To ensure an accurate payment review, staff must be trained to

identify healthcare contract provisions, understand medical vocabulary, and apply business skills, presentation skills, and audit techniques.

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.

Triage Consulting has committed to hiring 23 new employees (Job Number 2). The Company represents that the date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. The Company also represents that these trainees will be hired into "net new jobs" as a condition of contract.

Based on a revenue forecast increase of 6% in the next year, Triage Consulting is expanding existing business capacity by adding newly hired employees to its existing functions. The Company plans to expand its current facility by adding office space to accommodate these employees. Although subject to a lower post-retention wage of $13.70, Job Creation trainees, will start at $22.00 per hour.

Training Plan

Business Skills (65%): Training will be offered to all occupations. Training topics include healthcare, insurance, audit and documentation, Medicare and Medicaid reimbursement structures, the Affordable Care Act, Hospital Coding, decision making, negotiation skills, problem solving and process improvement. Training will ensure trainees gain understanding of the nuances associated with healthcare billing and reimbursement.

Computer Skills (30%): Training will be offered to all occupations. Courses include Intermediate and Advanced Office Suite, Database Management and Trakker. Training will help employees efficiently monitor, record, document and manage caseloads effectively.

Management Skills (5%): Training will be offered to Managers in effective coaching, leadership, change management and teambuilding. Training will help support Managers provide leadership in a changing work environment while effectively communicating teamwork.

Commitment to Training

The Company's annual training expenditure for the California facility is approximately $108,000. Past training includes new-hire orientation, all Federal and State mandated training, on-the-job training, and basic computer skills.

Triage Consulting 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

Two staff members will administer the training program, schedule, collect rosters and attend monitoring visits. An administrative subcontractor (Tax Credits Co.) will assist with administrative processes.

<u>RECOMMENDATION</u>

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Tax Credit Co. in Los Angeles assisted with development of this proposal for a flat fee of $18,941.

ADMINISTRATIVE SERVICES

Tax Credit Co. will also perform administrative services in connection with this proposal for a fee not to exceed 12% 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

- Administrative Requirements (Documentation procedures for Audit Finding)
- Affordable Care Act Updates
- Auditing Techniques
- Best Practices
- Business Report Writing
- Communication Skills
- Conflict Resolution
- Constructive Feedback
- Contract Structure
- Decision Making
- Effective Meetings
- ICD-10 – Hospital Coding
- Identifying Billing Errors
- Ins and Outs of Insurance Policies (Understanding the Components of an Insurance Policy)
- Invoicing Requirements
- Medicaid Rules and Regulation
- Medical Terminology
- Medicare Rules and Regulation
- Negotiation Skills
- Presentation Skills
- Problem Solving
- Process Improvement
- Project Management
- Research Techniques
- Reviewing Medical Records
- Statistical Analysis
- Understanding Health Insurance Portability and Accountability Act

COMPUTER SKILLS

- Intermediate & Advanced Office Suite
- Database Management
- Trakker (Internal Software Tool)

MANAGEMENT SKILLS (Managers Only)

- Change Management
- Coaching Procedures
- Leadership skills
- Teambuilding

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:

ProTransport-1, LLC

Agreement Number: ET16-0159

Panel Meeting of: August 28, 2015

ETP Regional Office: Sacramento **Analyst:** M. Jones

PROJECT PROFILE

Contract Attributes:	SET HUA Job Creation Initiative Priority Rate Medical Skills Training Veterans	Industry Sector(s):	Healthcare Services Priority Industry: ☒ Yes ☐ No
Counties Served:	Contra Costa, Alameda, Sonoma, Stanislaus, Santa Clara, Sacramento	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☒ Yes ☐ No United Steel Workers EMS Local 12911		

Number of Employees in:	CA: 500	U.S.:500	Worldwide: 500
Turnover Rate:	5%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$528,450		$0	$0		$528,450

In-Kind Contribution:	100% of Total ETP Funding Required	$689,000

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 Medical Skills Training Priority Rate SET HUA	Continuous Impr, Computer Skills, MS Preceptor, MS Didactic	179	8-200	0	$1,350	$11.30*
				Weighted Avg: 75			
2	Retrainee Medical Skills Training Priority Rate SET	Continuous Impr, Computer Skills, MS Preceptor, MS Didactic	24	8-200	0	$1,350	$24.00
				Weighted Avg: 75			
3	Job Creation Initiative Medical Skills Training Priority Rate SET	Continuous Impr, Computer Skills, MS Preceptor, MS Didactic	137	8-200	0	$1,600	$12.86
				Weighted Avg: 80			
4	Job Creation Initiative Medical Skills Training Priority Rate SET Veterans	Continuous Impr, Computer Skills, MS Preceptor, MS Didactic	20	8-200	0	$1,760	$13.25
				Weighted Avg: 80			

***Job Number 1:** For Alameda, Contra Costa, Santa Clara, Sonoma and Sacramento Counties, ETP will accept the union-negotiated base wage for the three occupations listed under the Wage Range by Occupation table below. (For Stanislaus County, ETP will use the HUA modified wage.) For EMT, wage progression runs from 7 steps to 10 steps depending on Advanced Life Support (ALS) certification. Paramedics are all ALS with wage progression at 10 steps. Medical Transport Specialist wage progression is 2 steps. Union-negotiated health benefits vary with a floor of $1.04. All occupations are eligible for the employer-sponsored 401(k) Plan.

Minimum Wage by County: ***Job Number 1 SET:** $16.44 for Alameda, Contra Costa and Santa Clara Counties; $15.75 for Sacramento County; and $15.07 for Sonoma County.
Job Number 1 SET/HUA: $11.30 for Stanislaus County.
Job Number 2 SET: $20.55 per hour Priority Statewide Average Wage.
Job Number 3 SET (Job Creation): $13.70 for Alameda, Contra Costa and Santa Clara Counties; $13.13 for Sacramento County; and $12.33 for Stanislaus and Sonoma Counties.
Job Number 4 SET (Veterans): $13.70 for Alameda, Contra Costa and Santa Clara counties; $13.13 for Sacramento County; and $12.33 for Stanislaus and Sonoma 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 $0.84 per hour may be used to meet the Post-Retention Wage for Job Numbers 3 and 4.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Emergency Medical Technician (EMT)		131
Paramedic		24
Medical Transport Specialist		24
Job Number 2		
Registered Nurse		20
Training Coordinator		1
Frontline Training Supervisor		3
Job Number 3 Job Creation		
Registered Nurse		4
Emergency Medical Technician (EMT)		103
Paramedic		10
EMT Frontline Field Supervisor		1
Dispatcher		3
Customer Service Representative		3
Support Staff		5
Marketing/Sales Representative		1
Frontline Supervisor		1
Billing/Accounts Receivable Representative		3
Frontline Training Supervisor		1
Medical Transport Specialist		2
Job Number 4 Veterans Job Creation		
Emergency Medical Technician (EMT)		15
Paramedic		5

INTRODUCTION

ProTransport-1, LLC (ProTransport) (www.Protransport-1.com) was founded in 2000 in Cotati. The Company is a leading provider of non-emergency inter-facility ambulance services for patients and healthcare facilities throughout the Bay Area and Central Valley. The Company is known nationally for patient advocacy and its unique approach to technology integration which has led to being featured in *Inc. Magazine's* list of the fastest growing private companies in America four years running. All 14 locations in California will participate in training.

PROJECT DETAILS

ProTransport staff will require multiple skills and competencies in order to uphold high standards. The safety and quality of care during patient transportation is directly related to how well the staff is trained. As well, a combination of increasing call volume and acuity of patients

has affected the need for additional training in quality of care. For instance, inter-facility transfers require a unique set of skills distinct from training by a hospital-based provider. The ETP-funded training will allow staff to become more familiar with the demands of providing care during ground transport, and to handle the variety of patient contingencies that may arise.

Retrainee - Job Creation

In support of Job Creation, the Panel is offering incentives to companies that commit to hiring new employees. Training for newly-hired employees will be reimbursed at a higher rate and trainees will be subject to a lower post-retention wage.

ProTransport has committed to hiring 157 new employees (Job Numbers 3 and 4). ProTransport represents that 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.

ProTransport’s call volumes and patient acuity has increased in recent years, as more of the population is eligible for healthcare under The Affordable Care Act. The Company has expanded its business capacity, investing over 2 million dollars in new equipment (a Computer-Aided Dispatch Software System, Employee Scheduling Management Software, HR Software, 10 fleet vehicles and 20 ambulances, with additional ambulance acquisitions to be made in late 2015) and hiring more staff to meet the increased demand.

Veterans Program

As a Veteran-owned company, ProTransport is committed to providing employment opportunities for those who have served our country. The Company attends and sponsors two Veterans events per year to meet and share employment openings with the Veteran community.

The Panel has established a higher reimbursement rate and other incentives for training California Veterans. The rate is $22 per hour, consistent with the “blended rate” for Medical Skills Training. The Veteran trainees in this proposal are in Job Number 4.

Training Plan

Computer Skills (10%): Training will be offered to Billing Staff, Accounts Receivable Representative, Dispatcher, Customer Service Representative, Emergency Medical Technician (EMT) and Support Staff to increase efficiency and proficiency in the newly installed system. Training course topics will include ICD-10 and Computer-Aided Dispatch.

Continuous Improvement (20%): Training will be offered to all occupations to improve customer service and knowledge to ensure high quality service. Training course topics will include Customer Service, Ambulance Operations Skills, and Standard Operating Procedures.

Medical Skills Training (70%):

The Panel has established a “blended” reimbursement rate for medical skills training, recognizing the higher cost of delivery for the Clinical Preceptor model. Medical Skills training will be reimbursed at a blended rate of $22 per hour, linked to course titles. The standard class/lab rate for priority industries, $18 and $20 per hour, will apply to Business Skills, Computer Skills and Continuous Improvement training.

For this project, approximately 24 Registered Nurses (RNs), 254 Emergency Medical Technicians (EMTs) and 39 Paramedics will participate in medical skills training utilizing both didactic and clinical-preceptor training delivery.

Commitment to Training

ProTransport currently has an annual training budget of $171,000, which includes training such as Sexual Harassment Prevention, ProTransport Policies and Procedures, and basic safety.

The Company 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.

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.

The trainees in Job Number 1, 3, and 4 may work in a High Unemployment Area (HUA) with unemployment exceeding the state average by 25%. The determination of HUA status is based on unemployment data from the Labor Market Information Division of the Employment Development Department. The Company's locations in Stanislaus County qualify for the HUA wage; this modification is requested for trainees in Job Number 1 only.

Union Support

Three of the occupations being trained are represented by United Steelworkers (USW) EMS Local 12911, throughout all locations where training will take place. These occupations are: EMT, Paramedic and Medical Transport. The union letter of support is included with this proposal.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

ProTransport retained National Training Systems, Inc. in Ladera Ranch to assist with development of this proposal for a flat fee of $28,950.

ADMINISTRATIVE SERVICES

ProTransport also retained National Training Systems, Inc. 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:

CONTINUOUS IMPROVEMENT

- Ambulance Operation Skills
- Customer Service
- Documentation Skills
- Communication Skills
- Conflict Resolution
- Crisis Prevention & Intervention (CPI)
- Critical Thinking
- Call Center & Dispatch Protocols
- EMS Communication & Protocols
- HIPPA
- Leadership Skills
- Performance & Quality Improvement
- Preceptor Skills (Train-the-Trainer)
- Standard Operating Procedures

COMPUTER SKILLS

- Intermediate to Advanced Microsoft Office Skills
- ICD -10
- Computer-Aided Dispatch

MEDICAL SKILLS TRAINING – CLINICAL WITH PRECEPTOR

- Ambulatory Patient Care Training
    - Advanced Cardiac Life Support
    - Code Blue Response & Procedures
    - Cardiac Patient Care
    - Critical care Transport
    - Code of Conduct
    - Critical Incidence Stress
    - Equipment Operation
    - Injury Prevention
    - NICU/PICU Team Transport
    - Standard Operating Procedures
    - Trauma Patient Care
    - Geriatric Patient Care
    - Patient Safety
    - Pediatric Patient Care
    - Pre-Hospital Trauma Life Support
    - Respiratory Arrest
    - Patient Assessment & Pre-Hospital Care
    - Patient Transport Techniques

MEDICAL SKILLS TRAINING – DIDACTIC

- Advanced Cardiac Life Support
- Basic Life Support (BLS)
- Airborne Pathogens

- Bloodborne Pathogens
- Body Mechanics
- Cardiac Assessment
- Care of the Bariatric Patient
- Care of Geriatric Patient
- Care of the Renal Patient
- Care of and Treatment of Shock Patients
- Care of the Stroke Patient
- Chronic Obstructive Pulmonary Disease (OCPD)
- Code Blue Response and Procedures
- Critical Care Skills
- Decontamination Procedures
- Dysrhythmia Recognition & Interpretation
- EKG & Cardiac Monitors
- Emergency Medical Technician (EMT) Skills Training (including EMT-1)
- Equipment Operation Skills
- Hazardous Materials/Protection
- HIPPA
- Medical Transport of High-Risk Patients
- Medication Administration & Reconciliation
- Neonatal Intensive Care Unit (NICU) Transport
- Neurological Assessment & Pre-Hospital Care
- Orthopedic Assessment & Pre-Hospital Care
- 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
- Renal Care
- Restraints
- Standards of Care
- Ventilator Operation

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

UNITED STEELWORKERS

UNITY AND STRENGTH FOR WORKERS

ET16-0159

District 12

Robert LaVenture
District Director

Chris Youngmark
Assistant to the Director

Ron Espinoza
Sub-District Director

SENT VIA EMAIL

June 30,, 2015

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

To whom it may concern:

This letter is to confirm the support of the United Steelworkers (USW) on behalf of its EMS Local 12911 for the Protransport-1 training proposal as submitted to the Employment Training Panel.

Sincerely,

Fernie Mirelez, Staff Representative,
United Steelworkers International Union

Cc: Union file

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

AB118

Training Proposal for:

El Camino Community College District, Center for Applied Competitve Technologies

Agreement Number: ET16-0802

Panel Meeting of: August 28, 2015

ETP Regional Office: North Hollywood **Analyst:** L. Vuong

PROJECT PROFILE

Contract Attributes:	AB118 (Alt Funds) Retrainee Priority Rate HUA	Industry Sector(s):	Transportation/Logistics Services Green Technology Priority Industry: ☒ Yes ☐ No
Counties Served:	Statewide	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☒ Yes ☐ No SEIU Local 721 LA County, SEUI Local 721 Monterey Park, AFSCME Local 1117, SEIU Local 521, BCEA, AMEA, SEIU 1021 BART, Amalgamated Transit Union Local 1277, SEIU Local 99, Teamsters Local 952, Teamsters Local 166, IUOE Local 501, Teamsters Local 848		
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		≤20%	

FUNDING DETAIL:

All funding will be under the Alternative and Renewable Fuel and Vehicle Technology Program created under AB118.

Program Costs	+	Support Costs	=	Total ETP Funding
$457,380		$31,416 8%		$488,796

In-Kind Contribution:	50% of Total ETP Funding Required	$533,716

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Adv. Technology, Commercial Skills	353	8-200	0	$1,058	$15.07
				Weighted Avg: 55			
2	Retrainee Priority Rate HUA	Adv. Technology, Commercial Skills	109	8-200	0	$1,058	$11.30
				Weighted Avg: 55			

Minimum Wage by County: **Job Number 1:** $16.44 per hour for Alameda, Contra Costa, Marin, San Francisco, San Mateo, and Santa Clara Counties; $15.97 per hour for Los Angeles County; $16.02 per hour for Orange County; $15.93 per hour for San Diego County; $15.75 per hour for Sacramento County; $15.56 per hour for Alpine County; and $15.07 per hour for all other counties. **Job Number 2 (HUA):** $11.30 per hour for Kern, Riverside, San Bernardino, and Ventura Counties.

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

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Mechanic		168
Maintenance Worker		50
Shop Lead		16
Technician		159
Manager/Supervisor Level 1		3
Manager/Supervisor Level 2		3
Analyst		6
Planning Technician		7
Firefighter Level 1		20
Firefighter Level 2		20
Paramedic		10

INTRODUCTION

Founded in 1946, El Camino Community College District, Center for Applied Competitive Technologies (El Camino CACT) (www.elcaminotraining.com) is a two-year community college offering academic and vocational education programs. The district established the Center for Applied Competitive Technologies to advance California's economic growth and global competitiveness. El Camino CACT provides customized training, workshops, and technical assistance to employers. El Camino CACT is a repeat multiple employer Contractor with both core funded and alternative funded Agreements.

AB 118

This proposal will be funded under the Alternative and Renewable Fuel and Vehicle Technology Program (ARFVTP) created in 2007 pursuant to AB 118. This program is administered by ETP in partnership with the California Energy Commission. The overall goal of the AB118 Program is to support a transition from petroleum-based transportation to alternative and renewable fuels and clean, low carbon vehicle technologies. There is no expenditure of Employment Training Tax funds for the AB 118 Program. Public entity employers are eligible to participate, such as city and county regional transit authorities, fire districts, and law enforcement agencies.

Training is focused on job skills needed to produce and distribute new alternative fuels. Additional skills may include how to design, construct, install, operate, service, and maintain new fueling infrastructure and vehicles.

Alternative Fuel is defined as any fuel other than the traditional selections, gasoline and diesel from petroleum sources, used to produce energy or power. Examples of alternative fuels are: bio-diesel, ethanol, methanol, electricity, propane, compressed or liquid natural gas, and hydrogen.

Under the AB 118 guidelines, there is no exclusion for non profit employers, and no requirement for out-of-state competition. The core participating employers are composed of both private and public employers with the majority from public agencies in mass transit, alternative fuels, transportation maintenance, and fleet services. The employer group will include municipalities, consistent with the Panel's AB118 guidelines, and training will target eligible employers statewide. Approximately 73% of training is expected to be held at El Camino CACT's facility and/or other training vendor locations. The remainder will be conducted at participating employer worksites. The core group of employers represents 100% of requested funding for this proposal.

PROJECT DETAILS

Many of the committed employers have done business with El Camino CACT in the past and have participated in previous Agreements. However, the curriculum has been refined and updated from the previous projects. Outreach has not changed as El Camino CACT continuously markets courses to new and existing clients.

This proposal will provide alternative fuel and related training in a variety of clean air technologies for light and heavy duty vehicles including hybrid-electric, electric, and compressed natural gas. In an effort to reach a wide spectrum of trainees and cover a variety of alternative fuel topics, training will reflect both general principles, as well as manufacturer-specific systems.

El Camino CACT has identified the Advanced Transportation & Renewable Energy (ATRE) Centers of Cerritos College, Long Beach City College, and City College of San Francisco as the lead training providers for this project. The ATRE Centers were created and placed statewide to help keep California competitive in the advanced transportation and energy technologies. Most of the proposed training will take place in the Southern California area. However, El Camino CACT anticipates that training will likely be extended to additional regions across the state.

Training Plan

El Camino CACT's curriculum is designed to serve the needs of a workforce transition from petroleum-based transportation to alternative and renewable fuels, and clean, low carbon vehicle technologies.

Advanced Technology (AT) (57%) - Training will be offered to all occupations. El Camino CACT is requesting the AT reimbursement rate for this training. Training requires the use of expensive equipment and instructors: innovative computer software, advanced engines/systems, sophisticated testing equipment and specially trained instructors. Due to the highly technical nature, the trainer-to-trainee ratio will not exceed 1:10 to allow in-depth coverage and personal attention.

Commercial Skills (43%) - Training will be offered to all occupations to help them better understand the inner workings of alternative fuel technology including hybrid-electric and various gaseous systems. Training will also provide trainees with safety standards pertaining to alternative fuel vehicles.

Prior Contract – AB118

El Camino CACT has had two prior AB 118 Agreements with ETP. The first was completed in March of 2013 (ET11-0806) and earned $350,018 (47%). There were communication issues in the first Agreement. However, El Camino CACT invested in a SharePoint database before attempting the second Agreement. The SharePoint database did improve communication as the second Agreement (ET14-0800) was completed on 08/04/15 with projected earnings of $341,950 (91%) at closeout.

Active Contract – AB 118

In response to continued demand for AB 118 funding, El Camino CACT entered into a current AB 118 Agreement which commenced on 01/01/15 with an end term date of 12/31/16 (ET15-0804). All training was completed on 06/10/15. According to El Camino CACT, 78 of the 80 planned trainees have completed training and are in retention. As of the submission of this proposal El Camino CACT has tracked 2,508 training hours for the aforemented 78 trainees. As such, El Camino CACT expects to closeout this Agreement early and projects potential earnings of $64,640 (100% of approved amount).

Commitment to Training

El Camino CACT represents that ETP funds will not displace the existing financial commitment to training made by the participating employers. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

ETP funding will allow these companies to introduce new technogy and services in order to remain competitive. El Camino CACT will only provide training to participating employers in subjects that are outside of their expertise.

High Unemployment Area

Trainees in Job Number 2 work in a High Unemployment Area (HUA) with unemployment exceeding the state average by at least 25%. Participating employers' locations in Kern, Riverside, San Bernardino, and Ventura Counties qualify for HUA status and thus, qualify for the Standard Minimum Wage instead of the Statewide Average Hourly Wage.

- Wage Modification

  For these trainees, the Panel may modify the ETP Standard Minimum Wage by up to 25% if post-retention wages exceed start-of-training wages. El Camino CACT is requesting a wage modification of 25% (from $15.07 per hour to $11.30 per hour).

Marketing and Support Costs

El Camino CACT's marketing and recruitment efforts include networking with existing clients, outreach to new businesses, and referrals from community college partners and economic development entities. El Camino CACT staff works closely with the South Bay Workforce Investment Board (WIB) and Pacific Gateway WIB, as well as firefighter and police groups throughout the state to market classes and recruit participants. El Camino CACT utilizes employer evaluations to assess specific training needs and industry trends. For this project, El Camino CACT also worked closely with various transportation organizations to help define course content and identify employers currently utilizing alternative fuel technology.

El Camino CACT has a program administrative team dedicated to project marketing, employer recruitment, needs assessments, trainer selection, and scheduling. Staff recommends the 8% support costs for this project.

Trainer Qualifications

El Camino CACT reports that majority of training will be delivered by training vendors who are qualified professional with years of industry and teaching experience.

Training Coordinator

El Camino CACT has designed a team of four staff to oversee ETP training administration including employer verification, enrollment, recording, tracking training completed, and invoicing.

Union Support

Included in the core group of employers are trainees represented by a total of 15 collective bargaining units. ETP has received letters of support from 13 collective bargaining units. The other two will be collected before training begins. El Camino CACT will not commence training until the respective union support letters have been provided to ETP.

RECOMMENDATION

Staff recommends approval of this proposal and the 25% wage modification for trainees in Job Number 2.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

Cerritos College – Advanced Transportation & Renewable Energy (ATRE) in Norwalk, Long Beach City College (ATRE) in Long Beach, and City College of San Francisco in San Francisco will be providing Advanced Technology and Commercial Skills training for an amount to be determined.

Additional training vendors may be identified during the Agreement term.

Exhibit B: Menu Curriculum

AB 118 Program

Class/Lab Hours

8 - 200 Trainees may receive any of the following:

Component No. 1 – Designed for Municipalities

Core AFV Courses

ADVANCED TECHNOLOGY

- Hybrid Vehicle Maintenance – For Prius, Insight, & Focus Vehicle Models
- Hybrid Vehicle Maintenance – For Escape Vehicle Models
- Advanced Engine Control Systems & Diagnostics
- CNG Conversions (Dropped Tank Safety Off the Title)
- Cummings CNG Engine/Fuel Systems – Including Engine Operation & Diagnostics, Insight Software, Cylinder Inspector Training & Fitting & Line Training
- ASE Certification Alternative Fuels (F1)
- ASE Certification CNG Fuels (H1)
- ASE Certification Electrical, Emissions – A6, H6, S6, T6
- Sustainability for Management Systems
  - Computers for Fleet Management (Alternative Fuel Vehicles)
  - Return on Investment Asset Management for Alternative Fuels
  - Labor Productivity
  - Extend Useful Life of Vehicles
  - Reduce Vehicle Ownership Costs
  - Regulatory Compliance
  - Shop Scheduling
  - Warranty & Claims Tracking
  - Preventive Maintenance Scheduling
  - License and Permit Management
  - Accident Repair Tracking and Claims Management
  - Mobile Wireless Handheld Technology
  - Best Practice Workflows
  - GPS/AVL (Automatic Vehicle Locations) Systems

COMMERCIAL SKILLS

- Hybrid Electrical Safety – All Vehicle Models
- Hydraulics for Alternative Fueled Vehicles (Electric)

Ancillary Courses

ADVANCED TECHNOLOGY

- First Responder – All Alternative Fueled Vehicles
  - Generalist
  - Operator
  - Advanced

COMMERCIAL SKILLS

- Electric Vehicle Basics

Component No. 2 – Designed for Small & Large Fleets (Both Private and Public)

Core AFV Courses

ADVANCED TECHNOLOGY

- Hybrid Vehicle Maintenance – For Prius, Insight, & Focus Vehicle Models
- Hybrid Vehicle Maintenance – For Escape Vehicle Models
- Advanced Engine Control Systems & Diagnostics
- CNG Conversions
- Electrical – Voltmeter, Schematics, Electricity Principles
- Biofuels – Preprocessing Used Cooking Oil, Feedstock Titration/Sampling, Biodiesel Washing Processes
- ASE Certification Alternative Fuels (F1)
- ASE Certification CNG Fuels (H1)
- Sustainability for Management Systems
    - Computers for Fleet Management (Alternative Fuel Vehicles)
    - Return on Investment Asset Management for Alternative Fuels
    - Labor Productivity
    - Extend Useful Life of Vehicles
    - Reduce Vehicle Ownership Costs
    - Regulatory Compliance
    - Shop Scheduling
    - Warranty & Claims Tracking
    - Preventive Maintenance Scheduling
    - License and Permit Management
    - Accident Repair Tracking and Claims Management
    - Mobile Wireless Handheld Technology
    - Best Practice Workflows
    - GPS/AVL (Automatic Vehicle Locations) Systems

COMMERCIAL SKILLS

- Hybrid Electrical Safety – All Vehicle Models Core AFB Courses
- Hydraulics for Alternative Fueled Vehicles (Electric)

Ancillary Courses

ADVANCED TECHNOLOGY

- First Responder – All Alternative Fueled Vehicles
    - Generalist
    - Operator
    - Advanced

COMMERCIAL SKILLS

- Electric Vehicle Basics

Component No. 3 – Designed for Small & Independent Repair Shops

Core AFV Courses

ADVANCED TECHNOLOGY

- Hybrid Vehicle Maintenance & Diagnostics
- Advanced Engine Control Systems & Diagnostics

COMMERCIAL SKILLS
- Hybrid Safety – All Models

Ancillary Courses

COMMERCIAL SKILLS
- Electric Vehicle Basics

CNG (Compressed Natural Gas) Technician Training

ADVANCED TECHNOLOGY
- PACCAR – Peterbuilt, Kenworth Engines
- Cummins Engines

COMMERCIAL SKILLS
- Intro to CNG Vehicle Safety
- CNG Operation & Basic Maintenance
- Properties & Characteristics of Natural Gas
- CNG Fueling Equipment & Safety Practices
- Emergency Action Plan
- Correct Use of Safety Equipment
- Natural Gas Fueling Station Safety
- Natural Gas Vehicle Technology
- Safe Fueling & De-Fueling of CNG-Powered Vehicles

Fuel System Inspector Training

ADVANCED TECHNOLOGY
- Fuel System Inspection
- Properties & Characteristics of Natural Gas
- Types of Cylinders Used in Natural Gas Vehicles
- Codes & Standards Covering CNG Cylinders
- Standards Covering Valves & Pressure Relief Devices
- Cylinder Installation
- Final Disposition
- Cylinder Disposal
- Fuel System De-Fueling
- Differences Between Standard & CNG-Powered Vehicles
- Integrating Electrical Systems When Converting to CNG
- Diagnostics & Troubleshooting CNG Systems

COMMERCIAL SKILLS
- Safety Protocols

Compressed Natural Gas (CNG) Fleet Operations & Use

ADVANCED TECHNOLOGY
- CNG Vehicle Diagnostics & Troubleshooting
- Advanced CNG Engine Diagnostics
- CNG Cylinder Handling & Inspection
- Programmable Logic Controls
- PACCAR – Peterbuilt, Kenworth Engine

- Cummins – Westport Engines

COMMERCIAL SKILLS
- Servicing & Maintaining CNG Systems
- CNG Fueling & Operations
- Preventive Maintenance CNG

Hybrid, Electric, Fuel Cell, & Hydrogen Vehicle System & Infrastructure Use

ADVANCED TECHNOLOGY
- Advanced Electrical for Hybrid/Electric Vehicles
- Programmable Logic Controls
- Hydrogen Vehicle Systems Infrastructure
- Advanced Diagnostics
- Electric Vehicle System Diagnostics & Training
- Network Electronics Diagnostics and Repair
- PLC/IO Systems Diagnostics

COMMERCIAL SKILLS
- Preventive Maintenance Inspection
- Hybrid Bus Charging, Starting, Electrical Troubleshooting & Repair
- Schematic Reading – Electrical Troubleshooting & Repair
- Hybrid Component Systems Troubleshooting
- Electronic Control Systems & Troubleshooting
- Fuel Cell Systems & Troubleshooting
- Hydrogen Systems & Troubleshooting

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

Participating Employers in Retrainee
Multiple Employer Contracts

Contractor's Name: El Camino CACT | CCG No.: ET16-0802

Reference No: 15-0473 |

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Bay Area Rapid Transit District (BART)

Address: 300 Lakeside Drive, 14th Floor

City, State, Zip: Oakland, CA 94612

Collective Bargaining Agreement(s): SEIU Local 1021

Estimated # of employees to be retrained under this Agreement: 70

Total # of full-time company employees worldwide: 3,060

Total # of full-time company employees in California: 3,060

Company: Burbank Water and Power

Address: 320 North Lake Street

City, State, Zip: Burbank, CA 91502

Collective Bargaining Agreement(s): Burbank City Employees Association

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

Total # of full-time company employees worldwide: 338

Total # of full-time company employees in California: 338

Company: City of Anaheim

Address: 955 S. Melrose, MS #19

City, State, Zip: Anaheim, CA 92085

Collective Bargaining Agreement(s): Anaheim Municipal Employees Association (AMEA)

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

Total # of full-time company employees worldwide: 1,922

Total # of full-time company employees in California: 1,922

Company: City of Bakersfield

Address: 4101 Truxtun Ave.

City, State, Zip: Bakersfield, CA 93308

Collective Bargaining Agreement(s): SEIU Local 521

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

Total # of full-time company employees worldwide: 1,491

Total # of full-time company employees in California: 1,491

Participating Employers in Retrainee
Multiple Employer Contracts

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: City of Glendale – Fleet Services Division of Public Works

Address: 541 W. Chevy Chase Dr.

City, State, Zip: Glendale, CA 91204-1813

Collective Bargaining Agreement(s): None

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

Total # of full-time company employees worldwide: 1,443

Total # of full-time company employees in California: 1,443

Company: City of Huntington Beach Fleet Operations

Address: 17371 Gothard Street

City, State, Zip: Huntington Beach, CA 92647

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement 2

Total # of full-time company employees worldwide: 18

Total # of full-time company employees in California: 18

Company: City of Long Beach, Fleet Services

Address: 2600 Temple Ave.

City, State, Zip: Long Beach, CA 90806

Collective Bargaining Agreement(s): International Association of Machinists and Aerospace Workers, District Lodge 947

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

Total # of full-time company employees worldwide: 118

Total # of full-time company employees in California: 118

Company: City of Monterey Park

Address: 320 W. Newmark Avenue

City, State, Zip: Monterey Park, CA 91754

Collective Bargaining Agreement(s): SEIU Local 721

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

Total # of full-time company employees worldwide: 400

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

Participating Employers in Retrainee
Multiple Employer Contracts

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: City of Torrance

Address: 3031 Torrance Boulevard

City, State, Zip: Torrance, CA 90503

Collective Bargaining Agreement(s): American Federation of State, County and Municipal Employees (TME-AFSCME) Local 1117

Estimated # of employees to be retrained under this Agreement: 8

Total # of full-time company employees worldwide: 1,197

Total # of full-time company employees in California: 1,197

Company: City of Whittier

Address: 13230 Penn Street

City, State, Zip: Whittier, CA 90602

Collective Bargaining Agreement(s): None

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

Total # of full-time company employees worldwide: 389

Total # of full-time company employees in California: 389

Company: Complete Coach Works

Address: 1863 Service Court

City, State, Zip: Riverside, CA 92507

Collective Bargaining Agreement(s): None

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

Total # of full-time company employees worldwide: 381

Total # of full-time company employees in California: 319

Company: L.A. County Department of Public Works

Address: 900 South Fremont Ave.

City, State, Zip: Alhambra, CA 91803

Collective Bargaining Agreement(s): SEIU Local 721

Estimated # of employees to be retrained under this Agreement: 8

Total # of full-time company employees worldwide: 3,400

Total # of full-time company employees in California: 3,400

Participating Employers in Retrainee
Multiple Employer Contracts

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Long Beach Transit
Address: 1963 E. Anaheim Street
City, State, Zip: Long Beach, CA 90813
Collective Bargaining Agreement(s): Amalgamated Transit Union Local 1277
Estimated # of employees to be retrained under this Agreement: 35
Total # of full-time company employees worldwide: 750
Total # of full-time company employees in California: 750

Company: Los Angeles Unified School District
Address: 115 North Beaudry Ave.
City, State, Zip: Los Angeles, CA 90012
Collective Bargaining Agreement(s): SEIU Local 99
Estimated # of employees to be retrained under this Agreement: 110
Total # of full-time company employees worldwide: 226
Total # of full-time company employees in California: 226

Company: MV Transportation, Inc.
Address: 5420 W. Jefferson Blvd.
City, State, Zip: Los Angeles, CA 90016
Collective Bargaining Agreement(s): Teamsters Local 848
Estimated # of employees to be retrained under this Agreement: 76
Total # of full-time company employees worldwide: 15,961
Total # of full-time company employees in California: 5,257

Company: Omnitrans
Address: 1700 W. 5th St.
City, State, Zip: San Bernardino, CA 92411
Collective Bargaining Agreement(s): Teamsters Local 166
Estimated # of employees to be retrained under this Agreement: 19
Total # of full-time company employees worldwide: 650
Total # of full-time company employees in California: 650

Participating Employers in Retrainee
Multiple Employer Contracts

Company: Orange County Sanitation District

Address: 10844 Ellis Avenue

City, State, Zip: Fountain Valley, CA 92708-7018

Collective Bargaining Agreement(s): International Union of Operating Engineers Local 501

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

Total # of full-time company employees worldwide: 626

Total # of full-time company employees in California: 626

Company: Orange County Transportation Authority (OCTA)

Address: 550 South Main Street

City, State, Zip: Orange, CA 92863

Collective Bargaining Agreement(s): Teamsters Local 952

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

Total # of full-time company employees worldwide: 1,501

Total # of full-time company employees in California: 1,501

Company: Varner Brothers, Inc.

Address: 1808 Roberts Lane

City, State, Zip: Bakersfield, CA 93308

Collective Bargaining Agreement(s): None

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

Total # of full-time company employees worldwide: 58

Total # of full-time company employees in California: 58

Company: Yellow Cab of Greater Orange County

Address: 13591 Harbor Blvd.

City, State, Zip: Garden Grove, CA 92843

Collective Bargaining Agreement(s): None

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

Total # of full-time company employees worldwide: 70

Total # of full-time company employees in California: 70

ET16-0802

LOCAL 721
SEIU
SERVICE EMPLOYEES
INTERNATIONAL UNION, CTW, CLC

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Lillian Cabral
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Wendy Thomas
VICE PRESIDENT
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Cammie Dudek
Bill Notte
Glenn Sanders
Ed Toole
David Warpness

June 2, 2015

To Employment Training Panel (ETP):

SEIU Local 721 is supportive of El Camino College's ETP Alternative and Renewable Fuel and Vehicle Technology Training Program with direct partnership with Cerritos College, Long Beach City College, and L.A. County Department of Public Works to provide training to all employees engaged in transportation maintenance. We understand that this is a new and exciting program designed for transits that are engaged in alternative fuels, transportation maintenance, and fleet services to support the state's effort to transition from petroleum-based transportation to alternative and renewable fuels and clean, los carbon vehicle technologies under Assembly Bill 118. The training received under this program will assist L.A. County Department of Public Works employees in acquiring valuable skills to work with alternative fuel vehicles.

Sincerely,

Lourdes Esparza

Lourdes Esparza
SEIU Local 721
Coordinator

http://www.seiu721.org

1545 Wilshire Blvd., Ste 100 • Los Angeles CA 90017-9664 • Tel (213) 368-8660 • Fax (213) 380-8043
6177 River Crest Dr., Ste B • Riverside CA 92507 • Tel (951) 571-7700 • Fax (951) 653-6310
340 S. Farrell Dr., Ste A104 • Palm Springs CA 92262 • Tel (760) 322-7191 • Fax (760) 322-7161
2472 Eastman Ave., Ste 30 • Ventura CA 93003-5774 • Tel (805) 650-4420 • Fax (805) 650-1028
222 W Carmen Lane Ste 201 • Santa Maria CA 93458 Tel (805) 523-5256 • (805) 623-5257
1651 E 4th St., Ste 120 • Santa Ana CA 92701-5143 • Tel (714) 338-5201 • Fax (714) 567-0124
42231 6th St. W., Ste 201 • Lancaster CA 93534 • Tel (661) 802-0977 • Fax (661) 974-7914

ET16-0802

LOCAL 721
SEIU
SERVICE EMPLOYEES
INTERNATIONAL UNION, CTW, CLC

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Linda Dent
VICE PRESIDENT
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INLAND AREA
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VICE PRESIDENT

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Bill Notte
Glenn Sanders
Ed Toole
David Warpness

March 16, 2015

To Employment Training Panel (EPT):

SEIU Local 721 is supportive of El Camino College's EPT Alternative and Renewable Fuel and Vehicle Technology Training Program with direct partnership with Cerritos College, Long Beach City College and City of Monterey Park to provide training to all employees engaged in transportation maintenance.

We understand that this is a new and exciting program designed for municipalities that are engaged in alternative fuels, transportation maintenance and fleet services to support the states effort to transition from petroleum-based transportation to alternative and renewable fuels and clean, low carbon vehicle technologies under Assembly Bill 118. The training received under this program will assist City of Monterey Park employees in acquiring valuable skills to work with alternative fuel vehicles.

Sincerely,

Jesus (Jesse) Hernandez
(Interim) President Monterey Park Chapter
SEIU Local 721

http://www.seiu721.org

1545 Wilshire Blvd. Ste 100 • Los Angeles CA 90017-9664 • Tel (213) 368-8660 • Fax (213) 380-8040
6177 River Crest Dr. Ste B • Riverside CA 92507 • Tel (951) 571-7700 • Fax (951) 653-6310
340 S. Farrell Dr. Ste A104 • Palm Springs CA 92262 • Tel (760) 322-7191 • (760) 322-7161
2472 Eastman Ave. Ste 30 • Ventura CA 93003-5774 • Tel (805) 650-4420 • Fax (805) 650-1028
933 Castillo St. • Santa Barbara CA 93101 • Tel (805) 963-4411 • Fax (805) 962-9643
1651 E. 4th St. Ste 120 • Santa Ana CA 92701-5143 • Tel (714) 338-5201 • Fax (714) 567-0124
42231 6th St. W. Ste 201 • Lancaster CA 93534 • Tel (661) 802-0977 • Fax (661) 974-7914

ET16-0802

AFSCME LOCAL 1117, AFL-CIO

TORRANCE MUNICIPAL EMPLOYEES

P.O. BOX 444, TORRANCE, CALIFORNIA 90508

NOVEMBER 1st 2013

To Whom It May Concern:

The City of Torrance and AFSCME Local 1117 recognizes that we have a workforce of broadly skilled individuals and are committed to providing ongoing training to maintain and improve their skills to keep up with changing technologies.

That said, AFSCME Local 1117 offers its support for the application of El Camino College to the State of CA employment training panel for funding to provide training programs on alternative technologies by way of AB 118. We are proud to support this program and we thank you for your time and consideration.

Sincerely,

Dave Wallace, President AFSCME Local 1117

ET16-0802

LOCAL 521
SEIU
Stronger Together

SERVICE EMPLOYEES INTERNATIONAL UNION
CTW-CLC

SAN JOSE H.Q.
2302 Zanker Road
San Jose, CA 95131
Phone: 408-678-3300
Fax: 408-954-1538
Phone: 408-678-3398
(Vendors)

BAKERSFIELD
1001 17th Street
Bakersfield, CA 93301
Phone: 661-321-4160
Fax: 661-325-7814

FRESNO
5228 E. Pine Avenue
Fresno, CA 93727
Phone: 559-447-2560
Fax: 559-261-9308

HANFORD
101 N. Irwin St., Suite 205
Hanford, CA 93230
Phone: 559-587-1521
Fax: 559-587-1524

SALINAS
HOLLISTER
334 Monterey Street
Salinas, CA 93901
Phone: 831-784-2560
Fax: 831-757-1863
Phone: 831-636-3455
Fax: 831-636-0787
(Hollister)

SAN CARLOS
981 Industrial Rd., Suite A
San Carlos, CA 94070
Phone: 650-801-3500
Fax: 650-595-1930

SANTA CRUZ
WATSONVILLE
517B Mission Street
Santa Cruz, CA 95060
Phone: 831-824-9255
Fax: 831-459-0756
Fax: 831-724-9095
(Watsonville)

VISALIA
1811 W. Sunnyside Avenue
Visalia, CA 93277
Phone: 559-635-3720
Fax: 559-733-5006

www.seiu521.org

March 11, 2015

To Employment Training Panel (ETP):

SEIU 521 continues to be supportive of El Camino College's ETP Alternative and Renewable Fuel and Vehicle Technology Training Program with direct partnership with Cerritos College, Long Beach City College, and City of Bakersfield to provide training to all employees engaged in transportation maintenance. We understand that this program has supported design for transits that are engaged in alternative fuels, transportation maintenance, and fleet services to support the state's effort to transition from petroleum-based transportation to alternative and renewable fuels and clean, low carbon vehicle technologies under Assembly Bill 118. The training received under this program has assist City of Bakersfield employees in acquiring valuable skills to work with alternative fuel vehicles.

Sincerely,

Marlene Valdez,
SEIU 521

ET16-0802

BURBANK CITY EMPLOYEES ASSOCIATION

AFSCME LOCAL 3143
221 West Alameda - Suite 103
Burbank, California 91502
(818) 843-8650 / (818) 843-8651 Fax
Website: www.bcea3143.org
Email: info@bcea3143.org

April 13, 2015

To whom it may concern:

The Burbank City Employees Association is in support of the Burbank Water and Power Fleet department employees that are "under the BCEA umbrella", receiving higher education and technical training for the "Alternative and Renewable Fuel and Vehicle Technology program." We are appreciative for the opportunity that has been granted them from the El Camino College.

Sincerely,

Jaime Torres, Sr.
President
Burbank City Employees' Association
AFSCME Local 3143

ET16-0802

Anaheim Municipal Employees Association

AMEA
Since 1946

351 E. Center Street
Anaheim, CA 92805
(714) 765-0125
FAX (714) 765-0124

March 11, 2015

To Employment Training Panel (ETP):

The Anaheim Municipal Employees Association (AMEA) is supportive of El Camino College's ETP Alternative and Renewable Fuel and Vehicle Technology Training Program with direct partnership with Cerritos College, Long Beach City College, and the City of Anaheim to provide training to all employees engaged in transportation maintenance. We understand that this is a new and exciting program designed for City of Anaheim employees that are engaged in alternative fuels, transportation maintenance, and fleet services to support the state's effort to transition from petroleum-based transportation to alternative and renewable fuels and clean, low carbon vehicle technologies under Assembly Bill 118. The training received under this program will assist City of Anaheim employees in acquiring valuable skills to work with alternative fuel vehicles.

Sincerely,

ANAHEIM MUNICIPAL EMPLOYEES ASSOCIATION

Mike Holmes
President

ET16-0802

July 1, 2015

Re: Union Letter of Support

To Employment Training Panel (ETP):

SEIU Local 1021, BART Professional Chapter is supportive of El Camino College's ETP Alternative and Renewable Fuel and Vehicle Technology Training Program with direct partnership with Cerritos College, Long Beach City College, and Bay Area Rapid Transit (BART) to provide "train the trainer" training to all employees engaged in transportation maintenance and new technology. We understand that this is a new and exciting program designed for transit organizations that are engaged in alternative fuels, transportation maintenance, and fleet services to support the state's effort to transition from petroleum-based transportation to alternative and renewable fuels and clean, low carbon vehicle technologies under Assembly Bill 118. The training received under this program will assist BART employees in acquiring valuable skills to work with alternative fuel vehicles.

Sincerely,

Deslar Patten

Deslar Patten
President, SEIU 1021 BART Professional Chapter

C: BART Labor Relations
Kimberly White, Manager, Rolling Stock & Shop

ET16-0802

Amalgamated Transit

Tel: (323) 222-1277
Fax: (323) 222-1335

Union – Local 1277

1744 North Main St.
Los Angeles, California 90031-2517

May 12, 2015

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

Dear Panel Members:

This letter is to advise you that the Amalgamated Transit Union, Local 1277 supports the ETP application submitted by the El Camino College district. This effort is a true Labor-Management training venture that builds on years of cooperative association. We believe the proposed plan will create a training program that will expand our members' skills to meet newly developed green industry standards.

We believe that the ETP-funded training will help Amalgamated Transit Union, Local 1277 employees attain the skills needed to position them for advancement and secure employment in the transit industry. We are enthusiastic about the program's potential and look forward to assisting you in any way necessary.

Sincerely,

Arturo E. Aguilar
Vice-President

Scanned by CamScanner

ET16-0802

LOCAL 99
EDUCATION WORKERS UNITED
SEIU

Barbara Torres
President

Sandra Lee
Vice President

Maggie Johnson
Treasurer

Gama Andrade
Secretary

Courtni Pugh
Executive Director

Executive Board

Child Care
Marta Gilda Delgado
Tonia McMillian
Amparo Moreno
Annie Thomas

County Office of Education
Ramon Capiral

Early Education
Jannette Morales

Higher Education
Lori L. Annala
Daniel B. Casey
Carlos H. Diaz
Christzann Ozan

Large Public K-12
Maggie Estell
Joseph Holguin
Edward A. Nwadibia

Small Public K-12
Jacqueline Brown
Keryl Cartee-McNeely
Adrian Cleveland
Michael Robertson

Retirees
Virginia Val Verde

March 21, 2014

Eldon R. Davidson
Director, Center for Customized Training
El Camino College – Business Training Center
13430 Hawthorne Blvd.
Hawthorne, CA 90250

Dear Mr. Davidson,

On behalf of the nearly 45,000 education workers who are members of SEIU Local 99 we are writing this letter in support of the ETP Alternative and Renewable Fuel and Vehicle Technology Training Program with direct partnership with Cerritos College, Long Beach City College, and Los Angeles Unified School District to provide training to all employees engaged in transportation maintenance.

We understand that this is a new and exciting program designed for school districts that are engaged in alternative fuels, transportation maintenance, and fleet services. It also supports the state's effort to transition from petroleum-based transportation to alternative and renewable fuels and clean, low carbon vehicle technologies under Assembly Bill 118 passed in 2007 by the state legislature.

For Local 99 members this program is a unique opportunity to receive expertise that will benefit their work and the services they provide to students. The training received under this program will assist Los Angeles Unified School District employees in acquiring valuable skills to work with alternative fuel vehicles.

Thank you for your attention to this important matter, should you have any additional questions please contact Caroline Mello on my staff at cmello@seiu99.org.

Sincerely,

Courtni Pugh
Executive Director

ET16-0802

LOCAL UNION NO. 952

GENERAL TRUCK DRIVERS, OFFICE, FOOD & WAREHOUSE UNION
ORANGE COUNTY AND VICINITY, CALIFORNIA

140 S. Marks Way • Orange, CA 92868-2698 • (714) 740-6200 • FAX (714) 978-0576 • www.teamsters952.org

Patrick D. Kelly
Secretary-Treasurer and Principal Officer

March 20, 2015

Via Electronic Mail, Facsimile and First Class Mail

Eldon R. Davidson
Director, Center for Customized Training
El Camino College
Business Training Center
13430 Hawthorne Blvd
Hawthorne, CA 90250

Employment Training Panel (ETP):

Teamsters Local 952 is in concurrence with the Orange County Transportation Authority's employees proposed Alternative and Renewable Fuel and Vehicle Technology Training Program with El Camino College. The Orange County Transportation Authority's Maintenance employees are covered by a collective bargaining agreement.

Sincerely,

Patrick D. Kelly
Secretary-Treasurer
Teamsters Local 952

cc: Frank J. Scholl, OCTA
Sherry Bolander, OCTA
Donna Metcalfe, LU952
Eric Henry, LU952
Ruben Lopez, LU952

ET16-0802

TEAMSTERS, CHAUFFEURS, WAREHOUSEMEN, INDUSTRIAL & ALLIED WORKERS OF AMERICA LOCAL UNION No. 166

P.O. BOX 899 • 18597 VALLEY BOULEVARD • BLOOMINGTON, CA 92316-0899
Telephone: (909) 877-TEAM • Fax: (909) 877-2812

MIKE BERGEN
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Recording Secretary

DON HENLEY
Trustee

DAN HERNANDEZ
Trustee

ROBERT STANLEY
Trustee

March 13, 2015

To Employment Training Panel (ETP):

Teamsters Local 166 is and continues to be supportive of El Camino College's ETP Alternative and Renewable Fuel and Vehicle Technology Training Program with direct partnership with Cerritos College, Long Beach City College, and Omnitrans to provide training to all employees engaged in transportation maintenance. We understand that this is a new and exciting program designed for bus transit systems that are engaged in alternative fuels, transportation maintenance, and fleet services to support the state's effort to transition from petroleum-based transportation to alternative and renewable fuels and clean, low carbon vehicle technologies under Assembly Bill 118. The training received under this program will assist Omnitrans employees in acquiring valuable skills to work with alternative fuel vehicles.

Sincerely,

Mike Bergen

Mike Bergen,

Secretary Treasurer, Teamsters Local 166

ET16-0802

INTERNATIONAL UNION OF OPERATING ENGINEERS
LOCAL 501, AFL-CIO
WWW.LOCAL501.ORG

SOUTHERN CALIFORNIA
SOUTHERN NEVADA
HEADQUARTERS
2405 WEST 3RD STREET
LOS ANGELES, CA 90057
TEL (213) 385-1561
FAX (213) 385 7324

EDWARD J. CURLY
BUSINESS MANAGER

March 20, 2015

Mr. Jim Herberg
General Manager
Orange County Sanitation District
10844 Ellis Avenue
Fountain Valley, CA 92708

Re: State of California Employee Training Panel

To Whom It May Concern:

The International Union of Operating Engineers Local 501 share a common goal of ensuring that we have a broadly skilled workforce and that our workers are provided ongoing training to maintain and improve their skills to keep up with rapid changing technologies.

To that end, International Union of Operating Engineers Local 501 would like to offer our support for the application of El Camino College to the State of California Employment Training Panel for funding to provide training programs on alternative fuel technologies via Assembly Bill 118.

We thank you for your consideration and are available if you have any questions.

Sincerely,

Edward J. Curly
Business Manager
IUOE Local 501

EJC: ca

ET16-0802

Teamsters Local Union No. 848

Chartered in 1937

ERIC TATE
SECRETARY-TREASURER

May 6, 2015

To Employment Training Panel (ETP):

Teamsters Local 848 is supportive of El Camino College's ETP Alternative and Renewable Fuel and Vehicle Technology Training Program with direct partnership with Cerritos College, Long Beach City College, and MV Transportation to provide training to all employees engaged in transportation maintenance. We understand that this is a new and exciting program designed for transits that are engaged in alternative fuels, transportation maintenance, and fleet services to support the state's effort to transition from petroleum-based transportation to alternative and renewable fuels and clean, low carbon vehicle technologies under Assembly Bill 118. The training received under this program will assist MV Transportation employees in acquiring valuable skills to work with alternative fuel vehicles.

Sincerely,

Eric Tate

Eric Tate
Secretary-Treasurer
Teamsters Local 848

Our Members Are Our Strength. . .Our Children Are Our Future. . .Our Retirees Are Our Foundation

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Affiliated with the International Brotherhood of Teamsters

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Studio Arts, Ltd.

Agreement Number: ET16-0151

Panel Meeting of: August 28, 2015

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

PROJECT PROFILE

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

FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
$841,360		$58,248 8%		$899,608

In-Kind Contribution:	50% of Total ETP Funding Required	$836,628

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Advanced Technology	584	8-240	0	$1,112	$15.97
				Weighted Avg: 40			
2	Retrainee Priority Rate SB<100	Advanced Technology	200	8-240	0	$1,215	$15.97
				Weighted Avg: 45			

Minimum Wage by County: $15.97 for Los Angeles County

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

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Animator 1		75
Animator 2		50
Art Director 1		20
Art Director 2		20
Artist 1		50
Artist 2		40
Compositor 1		75
Compositor 2		20
Construction Coordinator 1		10
Construction Coordinator 2		10
Costume Designer 1		15
Costume Designer 2		15
Editor 1		20
Editor 2		20
Hair Stylist 1		2
Hair Stylist 2		2

Illustrator/Storyboard 1		20
Illustrator/Storyboard 2		20
Lighting Tech 1		15
Lighting Tech 2		10
Makeup Artist 1		5
Makeup Artist 2		5
Matte Artist 1		15
Matte Artist 2		10
Model Maker 1		15
Model Maker 2		15
Modeler 1		50
Modeler 2		25
Ornamental Plasterer 1		3
Ornamental Plasterer 2		3
Production Designer 1		3
Production Designer 2		3
Prop Designer/Animation 1		10
Prop Designer/Animation 2		10
Prop Maker 1		15
Prop Maker 2		15
Set Decorator 1		10
Set Decorator 2		10
Set Designer 1		20
Set Designer 2		5
Technical Director 1		10
Technical Director 2		10
Textures Artist 1		2
Textures Artist 2		2
Visual Development 1		2
Visual Development 2		2

INTRODUCTION

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

Studio Arts states that the entertainment industry is experiencing dramatic changes very quickly as traditional studio production companies are now being rivaled by companies such as Netflix, Amazon, Hulu, Google and other web-based, internet and associated mobile companies. The growing number of competing, world-wide employment markets for animation, film and visual effects companies located in California represents continued challenges for adaptation to change needed to be able to remain competitive as part of California's entertainment industry.

The entertainment industry is suffering as fewer companies are operating in Southern California. Worldwide Competition continues to be a great challenge to the industry. Employers face challenges to maintain technical superiority. Training is imperative to ensure trainees are the most highly skilled artists in the world, giving California companies a competitive edge.

Since the beginning of 2014, Studio Arts client base has grown to include an emerging group of entertainment design companies that are now utilizing training for special effects, visual effects, composting, set design, motion stage design, production design, character design, prop design, rapid prototyping and other digital design and fabrication. Studio Arts' client base now includes new, smaller production companies that are doing work for web-based producers such as Amazon, Google, Hulu, Netflix, YouTube and other related work in the Los Angeles area. Training will also be provided for training workers to design and produce props, accessories and other traditional costume and makeup design from large studios such as NBC/Universal who are looking to prepare costumes, special effects makeup using rapid prototyping and other advanced computer-based design processes for live action production.

Union Support

Included in the core group of employers are trainees represented by a total of five collective bargaining units. ETP has received letters of support from all five collective bargaining units (See Page 1). Studio Arts will not commence any training for trainees represented by a collective bargaining unit until the respective union support letters have been provided to ETP.

PROJECT DETAILS

Training Plan

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

Advanced Technology

Studio Arts is requesting the ETP Advanced Technology (AT) reimbursement of $26 per hour for the entire curriculum based on the high cost of instructor time, reduced 1:10 trainer-to-trainee ratio, equipment, software, books, and related materials.

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

expansive understanding of art and computers.

About 85% of the training will be delivered at the Studio Arts facility in Los Angeles and the other 15% at employer worksites. Center-based training will be delivered by industry experts in classrooms equipped with state-of-the-art; production-ready equipment and software intended to provide skills for professional, production-ready work. The equipment and software are expensive to purchase, operate, and maintain. A typical computer outfitted with the software costs in excess of $6,000, and the trainers' pay rate often exceeds $100 per hour. The highly technical material necessitates small classes of no more than 10 students per trainer, which also drives up the cost. Studio Arts' normal published rates are $50 per training hour.

Commitment to Training

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

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

Training Agency Certification

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

Marketing and Support Costs

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

There are currently five dedicated staff members who conduct employer marketing, recruitment, and assessment and provide project administration and tracking. Studio Arts is requesting 8% support for employer recruitment and needs assessments activities that will be ongoing throughout the term of the contract. Not only does Studio Arts recruit from a very large labor market, but due to rapid technological changes, they must spend a significant amount of time matching employer needs to the curriculum. Thus, staff recommends support costs.

Curriculum Development

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

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

Training Hours Limitation

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

In 2014, Studio Arts issued 65 mastery certificates and achieved a minimum 80% placement. As of July 2015, there are 57 individuals in this program, which normally takes six months to finish. ETP trainees generally take up to 12 months to complete this program as they are working full-time while attending training. It is anticipated that Studio Arts will have over 100 mastery certificate candidates by the end of December, 2015.

The Mastery Certificate of Completion is issued after completion of 240-hour of courses (versus single classes) in recognized skills sets such as 2D Digital Animation, Compositing and Visual Effects, and Digital Set Design. Certification will give trainees competence in specific core skills for software, hardware or application (e.g. Certificate of Completion for Digital Set Design – competency in AutoCAD, Vectorworks, Rhino and SketchUp Pro).

Studio Arts estimates that participating employers will request only 2 to 3% (approximately 20 trainees) of the ETP trainee population to participate in this training. Studio Arts staff states that the Mastery Certificate will make participants more valuable to participating employers and give students increased job security.

Retention

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

Tuition Reimbursement

Studio Arts 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, including the training hour modification and the alternative retention.

ACTIVE PROJECTS

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET15-0248	$749,749	8/24/14 – 8/23/16	749	421	37

Based on ETP Systems to date, 19,731 reimbursable hours have been tracked for potential earnings of $548,522 (73% of approved amount). Although the Contractor is currently at 73% of projected earnings, they anticipate earning 95 to 100% of the Agreement amount. Trainee retentions will not be completed until closer to the end term date of the Agreement due to the alternate retention of 500 hours within 272 days as permitted for the entertainment industry. Many of the trainees work for production companies with hiatus periods or down time in between productions requiring the alternate retention period of up to 272 days.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned
ET13-0359	Los Angeles	04/27/13 – 4/26/15	$749,705	$731,223 (98%)
ET12-0290	Los Angeles	01/27/12 – 01/26/14	$499,499	$483,116 (97%)
ET11-0108	Los Angeles	12/31/10 – 12/30/12	$249,302	$249,302 (100%)

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

N/A

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
- Cinema 4D
- Composting
- Digital Art Department
- Digital Drafting
- Entertainment Design
- Game Design
- Graphic Design and Illustration
- Lighting, Dynamics and VFX
- MARI
- Maya
- Mobile Gaming
- Modeling
- Modo
- Motion Capture
- Motion Graphics
- Motion Tracking
- NUKE
- Roto & Tracking with MOCHA
- Painting and Textures
- Production Design
- Rapid Prototyping
- Revit
- Rhino
- Rigging
- SketchUp Pro
- Solidworks
- Special Effects Makeup
- Toon Boom
- Vectorworks
- Visual Effects
- ZBrush

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

Participating Employers in Retrainee
Multiple Employer Contracts

Contractor's Name: Studio Arts, Ltd. CCG No.: ET16-0151

Reference No: 15-0541

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: 3ality

Address: 55 E. Orange Grove Ave.

City, State, Zip: Burbank, CA 91502

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 12

Total # of full-time company employees in California: 12

Company: Acme Filmworks

Address: 3347 Motor Ave., Suite #100

City, State, Zip: Los Angeles, CA 90034

Collective Bargaining Agreement(s): No

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

Company: AFX Studio

Address: 14734 Arminta St.

City, State, Zip: Panorama City, CA 91402

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 9

Total # of full-time company employees in California: 9

Company: Age of Learning

Address: 101 N. Brand Blvd., 8th Floor

City, State, Zip: Glendale, CA 91502

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 50

Total # of full-time company employees worldwide: 320

Total # of full-time company employees in California: 316

Participating Employers in Retrainee
Multiple Employer Contracts

Company: AV Squad

Address: 7750 W. Sunset Blvd.

City, State, Zip: Los Angeles, CA 90046

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 101

Total # of full-time company employees in California: 101

Company: "Awkward" - MTV Productions

Address: 18412 Oxnard Street

City, State, Zip: Tarzana, CA 91356

Collective Bargaining Agreement(s): YES – Local 700, 706, 871

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

Total # of full-time company employees worldwide: 100

Total # of full-time company employees in California: 100

Company: Ayzenberg Group

Address: 49 E. Walnut St.

City, State, Zip: Pasadena, CA 91103

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 105

Total # of full-time company employees in California: 105

Company: Bento Box

Address: 5161 Lankershim Blvd., Suite 120

City, State, Zip: North Hollywood, CA 91601

Collective Bargaining Agreement(s): YES – Local 839

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

Total # of full-time company employees worldwide: 134

Total # of full-time company employees in California: 134

Participating Employers in Retrainee
Multiple Employer Contracts

Company: Bix Pix

Address: 11630 Tuxford Street

City, State, Zip: Sun Valley, CA 91354

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 15

Total # of full-time company employees worldwide: 50

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

Company: Concept Design Productions

Address: 718 S Primrose Ave.

City, State, Zip: Monrovia, CA 91016

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 15

Total # of full-time company employees in California: 15

Company: Cosa VFX

Address: 5543 Riverton Ave., Suite #4

City, State, Zip: North Hollywood, CA 91607

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 65

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

Company: Create Advertising

Address: 6022 Washington Blvd.

City, State, Zip: Culver City, CA 90232

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 105

Total # of full-time company employees in California: 81

Participating Employers in Retrainee
Multiple Employer Contracts

Company: Crown Media United States – Family Networks

Address: 12700 Ventura Blvd.

City, State, Zip: Studio City, CA 91604

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 205

Total # of full-time company employees in California: 121

Company: "Element" - Amnesia Productions

Address: 2835 Naomi

City, State, Zip: Burbank, CA 91504

Collective Bargaining Agreement(s): Yes - 871

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

Total # of full-time company employees worldwide: 120

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

Company: Engine Room

Address: 6430 Sunset Blvd., #425

City, State, Zip: Los Angeles, CA 90028

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 11

Total # of full-time company employees in California: 11

Company: Film Illusions

Address: 1735 S. Grand Ave.

City, State, Zip: Glendora, CA 91740

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 17

Total # of full-time company employees in California: 17

Participating Employers in Retrainee
Multiple Employer Contracts

Company: Fuse FX

Address: 2316 W. Victory Blvd.

City, State, Zip: Burbank, CA 91506

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 35

Total # of full-time company employees worldwide: 130

Total # of full-time company employees in California: 100

Company: Global Trend Productions

Address: 4514 W Vanowen St.

City, State, Zip: Burbank, CA 91505

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 65

Total # of full-time company employees worldwide: 300

Total # of full-time company employees in California: 300

Company: Halon

Address: 2932 Nebraska Ave.

City, State, Zip: Santa Monica, CA 90404

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 8

Total # of full-time company employees worldwide: 25

Total # of full-time company employees in California: 25

Company: Hasbro

Address: 2950 N. Hollywood Way – Suite 100

City, State, Zip: Burbank, CA 91505

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 45

Total # of full-time company employees worldwide: 6,000

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

Participating Employers in Retrainee
Multiple Employer Contracts

Company: "House Hunters" HGTV - Pie Town

Address: 7655 Haskell Ave.

City, State, Zip: Van Nuys, CA 91406

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 100

Total # of full-time company employees in California: 100

Company: IB Squared Inc.

Address: 6135 Wilshire Blvd.

City, State, Zip: Los Angeles, CA 90048

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 65

Total # of full-time company employees in California: 65

Company: Infinity Ward

Address: 21255 Burbank Blvd., #600

City, State, Zip: Woodland Hills, CA 91367

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 75

Total # of full-time company employees worldwide: 250

Total # of full-time company employees in California: 250

Company: Inhance Digital

Address: 8057 Beverly Blvd., #200

City, State, Zip: Los Angeles, CA 90048

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 90

Total # of full-time company employees in California: 90

Participating Employers in Retrainee
Multiple Employer Contracts

Company: Isolated Ground

Address: 918 Justin Ave.

City, State, Zip: Glendale, CA 91201

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 15

Total # of full-time company employees worldwide: 45

Total # of full-time company employees in California: 45

Company: Jakks Pacific

Address: 22619 Pacific Coast Highway

City, State, Zip: Malibu, CA 90265

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 65

Total # of full-time company employees worldwide: 700

Total # of full-time company employees in California: 300

Company: Master Key Productions

Address: 7461 Beverly Blvd., Suite 304

City, State, Zip: Los Angeles, CA 90038

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 60

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

Company: "Masters of Sex" - Remote Broadcasting

Address: 10202 W. Washington Blvd.

City, State, Zip: Culver City, CA 90232

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 35

Total # of full-time company employees worldwide: 150

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

Participating Employers in Retrainee
Multiple Employer Contracts

Company: "Modern Family" C&C

Address: 10201 W. Pico Blvd. – Bldg. 226

City, State, Zip: Los Angeles, CA 90035

Collective Bargaining Agreement(s): Yes – Local 871

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

Total # of full-time company employees worldwide: 100

Total # of full-time company employees in California: 100

Company: NBC – Wilshire Studios

Address: 5750 Wilshire Blvd.

City, State, Zip: Los Angeles, CA 90036

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 1300

Total # of full-time company employees in California: 715

Company: Pixwell

Address: 5340 Cangas Dr.

City, State, Zip: Calabasas, CA 91301

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 7

Total # of full-time company employees in California: 7

Company: Quantum Creation FX

Address: 3210 W. Valhalla Dr.

City, State, Zip: Burbank, CA 91505

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 15

Total # of full-time company employees in California: 15

Participating Employers in Retrainee
Multiple Employer Contracts

Company: Rando Productions

Address: 11939 Sherman Rd.

City, State, Zip: North Hollywood, CA 91605

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 35

Total # of full-time company employees in California: 35

Company: Renegade Animation

Address: 1111 E. Broadway, Suite 208

City, State, Zip: Glendale, CA 91205

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 45

Total # of full-time company employees in California: 45

Company: Sideshow Collectibles

Address: 2130 Conejo Spectrum St.

City, State, Zip: Thousand Oaks, CA 91320

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 107

Total # of full-time company employees in California: 101

Company: Six Point Harness

Address: 1759 Glendale Ave.

City, State, Zip: Los Angeles, CA 90026

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 55

Total # of full-time company employees in California: 55

Participating Employers in Retrainee
Multiple Employer Contracts

Company: Spectral Motion

Address: 1849 Dana St.

City, State, Zip: Glendale, CA 91201

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 100

Total # of full-time company employees in California: 100

Company: Spin Master

Address: 5880 W. Jefferson Blvd.

City, State, Zip: Los Angeles, CA 90016

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 35

Total # of full-time company employees worldwide: 850

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

Company: Stargate Studios

Address: 1001 El Centro St.

City, State, Zip: South Pasadena, CA 91030

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 85

Total # of full-time company employees in California: 70

Company: The Visionary Group

Address: 5890 W. Jefferson Blvd., Studio M

City, State, Zip: Los Angeles, CA 90016

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 125

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

Participating Employers in Retrainee
Multiple Employer Contracts

Company: Thinkwell Group

Address: 2710 Media Center Dr.

City, State, Zip: Los Angeles, CA 90065

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 65

Total # of full-time company employees worldwide: 200

Total # of full-time company employees in California: 183

Company: "Togetherness" - The Royal We Prod/HBO

Address: 5800 Sunset Blvd., Bldg. 11, Ste. 201

City, State, Zip: Hollywood, CA 90028

Collective Bargaining Agreement(s): YES – Local 871 and Local 399

Estimated # of employees to be retrained under this Agreement: 40

Total # of full-time company employees worldwide: 120

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

Company: Trailer Park Inc.

Address: 6922 Hollywood Blvd., 12th Floor

City, State, Zip: Hollywood, CA 90028

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 125

Total # of full-time company employees worldwide: 433

Total # of full-time company employees in California: 433

Company: Treyarch Corporation

Address: 3420 Ocean Park Blvd., Suite 100

City, State, Zip: Santa Monica, CA 90405

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 50

Total # of full-time company employees worldwide: 250

Total # of full-time company employees in California: 250

Participating Employers in Retrainee
Multiple Employer Contracts

Company: Troika

Address: 101 S. La Brea Ave.

City, State, Zip: Los Angeles, CA 90036

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 15

Total # of full-time company employees worldwide: 47

Total # of full-time company employees in California: 47

MOTION PICTURE EDITORS GUILD

June 30, 2015

To Whom It May Concern:

The Editors Guild, IATSE Local 700 is pleased to participate in the newly proposed ETP training offered at Studio Arts. We feel that ETP training is a valued asset for our membership in order that they remain highly trained and competitive on the job.

Training initiatives such as that offered by the Employment Training Panel keeps our members at the ready for trends in industry that happen quickly and often. This past year Studio Arts has been training our members and we are pleased at the significant upgrades to their skills that have come as a result.

If you have any questions regarding this matter please feel free to contact me.

Sincerely,

Dieter Rozek
IATSE Local 700
The Editors Guild

7715 Sunset Boulevard, Suite 200, Hollywood, CA 90046 • (323) 876-4770 or (800) 705-8700 • Fax (323) 876-0861
145 Hudson Street, Suite 201, New York, NY 10013 • (212) 302-0700 • Fax (212) 302-1091
Local 700, I.A.T.S.E. & M.P.T.A.A.C. • http://www.editorsguild.com • mail@editorsguild.com

® 330

International Alliance of Theatrical Stage Employees, Moving Picture Technicians, Artists and Allied Crafts of the United States, it's Territories and Canada

Make-Up Artists & Hair Stylists Guild Local 706

MAKE-UP ARTISTS and HAIR STYLISTS GUILD LOCAL 706

828 N. Hollywood Way, Burbank, CA 91505
(818) 295-3933 • Fax (818) 295-3930
www.local706.org

7/22/2015

To whom it may concern,

My name is Tommy Cole, and I am the Business Representative for local 706, Make-up Artists and Hair Stylists Guild. I wish to voice our Local's support for ETP funding for Studio Arts for the coming year.

For years now Studio Arts has provided ETP training to our 706 members who work at various production companies within our jurisdiction. Many of these companies do not have the resources to do the types of training that Studio Arts provides to keep our members at the top of their game, where it comes to advanced technical skills sets.

That being said, we ask that you please find a way to fund this training in order that we can satisfy the skills needs for our membership to remain competitive for viable jobs in the future.

If you have any questions regarding this matter, please feel free to contact me at my office at 818 295-3933, Ext. 100.

Sincerely

Tommy Cole
Business Representative

June 30, 2015

To Whom It May Concern:

The Animation Guild, IATSE Local 839, is pleased to support Studio Arts' continued participation in the ETP Training Program.

Local 839 represents over three thousand animation artists and technicians in the Southern California area. The training offered to our members through Studio Arts funded by the state through the ETP program is a key factor in keeping our members up to date on the latest skills and techniques in an ever evolving landscape of software used in animation production.

Mr. Hulesman's commitment to bringing the highest quality training to the entertainment community that adjusts constantly to the needs of production across the different sectors of entertainment is lauded by both our members, and members of sister IATSE locals across the Southern California Region. We look forward to his continued service to those members and our contracted studio partners.

Please feel free to contact me with any questions or concerns.

Sincerely,

Steven Kaplan
Labor Organizer
IATSE Local 839

the animation guild
IATSE LOCAL 839

1105 North Hollywood Way
Burbank, CA 91505-2528
T 818 845.7500 F 818 843.0300

www.animationguild.org

SCRIPT SUPERVISORS/CONTINUITY, COORDINATORS, ACCOUNTANTS & ALLIED PRODUCTION SPECIALISTS GUILD LOCAL 871

July 27, 2015

To Whom It May Concern:

Our union, IATSE Local 871, enthusiastically supports the proposed ETP training offered at Studio Arts. ETP training has proven to be a valuable means for our membership to remain highly trained and competitive on the job.

It is our view that funding such as that given through the Employment Training Panel keeps our members informed and ready for changes that happen quickly and often in our industry.

As a result, we are pleased to endorse ETP and the significant upgrades to our artists' skills that have and can continue to come through this valuable training.

If you have any questions regarding this matter, please feel free to contact me.

Sincerely,

Leslie Simon

Leslie Simon
Business Representative
Local 871

11519 Chandler Boulevard
North Hollywood, California 91601-2618
Telephone: (818) 509-7871
Facsimile: (818) 506-1555

Business Representative: Leslie Simon
Business Representative Email: leslie@ialocal871.org
Local 871 Office Email: office@ialocal871.org
Website: www.ialocal871.org

STUDIO TRANSPORTATION DRIVERS
TEAMSTERS LOCAL 399 HOLLYWOOD
LOS ANGELES, CALIFORNIA

STEVE DAYAN
Secretary-Treasurer

WES PONSFORD
President

ED DUFFY
Vice President

ROSE FALCON
Recording Secretary

KENNY FARNELL
Trustee

CHRIS SELL
Trustee

GARY ZUCKERBROD
Trustee

AFFILIATED WITH THE INTERNATIONAL BROTHERHOOD OF TEAMSTERS

To Whom It May Concern:

This letter is in order to voice Teamsters Local 399 support for ETP funding for Studio Arts for the coming year. It is our understanding that there have been budget constraints that may limit funding the Entertainment Industry MEC that Studio Arts has applied for, and we are concerned over this matter.

For years now Studio Arts has provided ETP training to our Teamsters Local 399 Brothers and Sisters who work on various productions throughout California. Many of these companies do not have the resources to do the types of training that Studio Arts provides to keep our Members at the top of their game where it comes to advanced technical skills sets.

Therefore, we ask that you please find a way to fund this training in order that we can satisfy the skills needs for our Membership to remain competitive for jobs likely to require them in the future.

If you have any questions regarding this matter, please do not hesitate to contact me at eduffy@ht399.org or by phone at (818) 432-3306.

Sincerely,

Ed Duffy
Vice President
eduffy@ht399.org

4747 VINELAND AVENUE, NORTH HOLLYWOOD, CA 91602 • FOR MAIL: P.O. BOX 6017 NORTH HOLLYWOOD, CA 91603
FRONT OFFICE: 818 985-7374 • WEBSITE: www.ht399.org • FAX: 818 985-0097

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Alameda County Electrical Industry Apprenticeship and Training Trust

Agreement Number: ET16-0908

Panel Meeting of: August 28, 2015

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

PROJECT PROFILE

Contract Attributes:	Retrainee Apprenticeship Priority Rate	Industry Sector(s):	Construction Green Technology Priority Industry: ☒ Yes ☐ No
County Served:	Alameda	Repeat Contractor:	☒ Yes ☐ No
Union:	☒ Yes ☐ No International Brotherhood of Electrical Workers Local 595		
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		N/A	

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
$460,880		$31,860 8%		$492,740

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

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Journeyman Priority Rate	Commercial Skills, Business Skills, Computer Skills, OSHA 10/30	85	8-200	0	$564	$50.40
				Weighted Avg: 24			
2	Retrainee Apprentice	Commercial Skills, OSHA 10	160	8-210	0	$2,780	$22.68
				Weighted Avg: 200			

Minimum Wage by County: SET Statewide Priority Industry of $20.55 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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Journeyman Electrician/Inside Wireman		85
Apprentice Electrician/Inside Wireman		160

INTRODUCTION

Alameda County Electrical Industry Apprenticeship and Training Trust (Alameda Electrical Trust) (www.595jatc.org), is a joint labor management organization, founded in 1946 to provide high quality and up-to-date training in electrical inside wiring for Apprentice, Pre-Apprentice and Journeyman members of IBEW Local 595. A Board of Trustees comprised of four labor representatives and four management representatives representing an estimated 346 employers governs the Trust.

In May of 2013, the Trust opened its Zero Net Energy Training Center in San Leandro. The training center is one of only a small number of U.S. Department of Energy–designated “zero net energy” buildings in the nation. This unique, state-of-art site will help electricians prepare for California’s new energy conservation and renewable energy efforts.

The Trust currently serves 192 apprentices and 2,000 journeymen. This is the Trust’s fifth ETP project, and the third within the last five years.

Electricians plan, install, test, repair and maintain electrical equipment that provide light, heat, communications, and power. It is the Trust’s mission to ensure workers have the most advanced technology skills training possible. In addition, the Trust provides training, which helps decrease the frequency of workplace accidents and injury. To be competitive in today’s green construction industry, Electricians require the skills to install green electrical systems as well as

meet Title 24 requirements. Title 24 mandates the use of automated lighting control devices and automatic plug load circuit controls.

Because of new regulations, many contractors in the construction industry are requiring multiple certifications for both Apprentices and Journeymen. The Trust has to ensure that additional instructors are certified to deliver more frequent and various types of certification classes. In addition, many of the certification classes require new classroom training equipment. Without support from ETP funding, these new costs would mean that the Trust would hold fewer classes and serve fewer workers. ETP funding will help expand its classes to meet employer demand for certified workers, and to train the growing number of newly registered Apprentices.

Employer Demand for Training

As Journeyman electricians retire and new work develops in Alameda County, training will ensure that there are enough qualified Electricians to meet the needs of employers in Alameda County. The trust will supply Electricians to Oakland Army Base, several hospitals under construction (Kaiser Hospitals in San Leandro and Oakland, Alta Bates and Highland Hospital in Oakland), the BART connector to the Oakland Airport, the BART extension from Fremont to Warm Springs, school projects at the University of California Berkeley campus, and the Alameda Naval Station and Brooklyn Basin projects in Oakland. In addition, there are numerous commercial construction projects.

The Alameda Electrical Trust is requesting funding for Apprentice and Journeyman training. Apprentices will receive training on the Related and Supplemental Instruction (RSI) curriculum which is required to become journeymen electricians. Training for journeymen will expand green training topics that will meet new state energy efficiency goals and employer-driven certification classes.

Apprenticeship Program

The Panel is authorized to fund Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). The Panel adopted the Apprenticeship Training Program as a pilot in March 2012. It is designed to supplement cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training.

RSI is delivered as class/lab, and ETP does not reimburse CBT delivery for apprenticeship training. The curriculum is developed with input from DAS and a designated Local Educational Agency (LEA) (in this case Chabot College). The Apprenticeship Program allows reimbursement for up to 200 hours of RSI plus OSHA10.

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 $5.00, reducing the priority industry rate from $18 to $13 per hour. ETP wage for Apprentices will be $20.55 per hour. This is the Special Employment Training Statewide for 2015 as modified for priority industries, which is being used for all apprentice occupation, for ease of administration. However, the actual wages paid are shown in the Training Plan Table and contract when they exceed $20.55.

DAS Completion Rates

The completion rate for this DAS-approved program for 2009-2013 is 79.34% and exceeds the industry completion percentage of 66.13%. This meets ETP standards.

PROJECT DETAILS

Training Plan

All class/lab training is center-based and will be delivered at the Trust's training center in San Leandro.

Journeyman Training

Commercial Skills (80%) –Journeyman training will bring skills and knowledge up-to-date. ETP funds will help to expand the Journeyman upgrade program, including the addition of new green training topics that will help the 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.

Business Skills (5%) - Training will enable 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.

Computer Skills (5%) - 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 (10%) - OSHA 10/30 training is typically delivered to workers in the building trades. 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.

Completion of the training results in a certificate that expands employment opportunities. To ensure that each trainee receives certification, ETP will only consider payment earned upon completion of the full 10 or 30-hour course.

Apprenticeship Training

Commercial Skills (90%) Apprentices will 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. Wireman Apprentices complete a five-year training program.

OSHA 10 (10%) This training provides an overview of occupational safety and health so that apprentices are more knowledgeable about workplace hazards and stringent safety standards in the electrical industry.

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 Journeymen 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, and revisions and updates are made based on workplace performance, requests of customers, the needs of the local electrical industry, as well as course evaluations completed by all trainees.

Trainer Qualifications

All trainers are former or current members of the trade and experts in their specific subject matter. In addition, all instructors meet standards set by the LEA.

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.

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. There are six staff people assisting with the marketing, recruitment and needs assessments.

The Trust's marketing efforts include direct mailings, informational flyers, personal contacts, telephone calls, public service announcements, emails, and the web. 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 participate 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. The Trust agrees to cover any additional costs which exceed the ETP support costs funding.

Tuition Reimbursement

In accordance with Title 22, CCR, Section 4412.1, Alameda Electrical Trust 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.

CURRENT CONTRACT PERFORMANCE

The following table summarizes performance by Alameda Electrical Trust under its current ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees Estimated	No. Completed Training	No. Retained
ET14-0912	$358,107	3/3/14 – 3/2/16	Apprentice-107 Journeymen-61	Apprentice-91 Journeymen-73	0

Based on the ETP tracking system, 34,169 reimbursable hours have been tracked which equates to 71% of the Agreement amount. Contractor anticipates 100% of the hours will be entered by the date of the August Panel meeting. The Contractor projects 100% earnings when the closeout invoice is processed by ETP.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET13-0914	Alameda	10/22/12 – 10/21/14	$354,796	$320,451 (90%)

DEVELOPMENT SERVICES

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

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

N/A

Exhibit B: Menu Curriculum

Class/Lab Hours **JOURNEYMAN**

8-200 (Job Number 1)

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 (AC/DC) Principles
  - Math for Electricians
  - Ohm's Law
  - Generators
  - Inductance/Reactance
  - Series/Parallel Circuits

- Grounding
  - Grounding and Bounding
  - 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 (PLC)
  - 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
  - Solar Panel Installation
  - Solar Photovoltaics
  - Building Automation Systems
  - Confined Space Entry
  - Specialized Tools
  - Conduit Bending
  - Rigging and Lifting
  - Firestop Installation
  - Blueprints and Schematics
  - Work Flow and Resources
  - Proper Installation and Use of Testing and Auditing Materials and Equipment (Green Training)
  - Understanding New Technologies and Changes to Industry Standards (Green Training)
  - Proper Equipment Set-Up (Green Training)
  - Safe Working
  - Advanced Instrumentation and Motor Controls
  - Programmable Logic Controllers
  - Advanced Welding
  - Architecture Designs and Advanced Plan Reading
  - Management and Monitoring of Materials
  - Testing Materials and Equipment – Proper Set-Up and Use (Green Training)
  - Understanding Changes to Industry Standards (Green Training)

- California Advanced Lighting Control Program (CALCP)
  - 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 (EVITP)

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 (AutoCAD)
➢ Job Tracking System
➢ Scheduling & Planning Jobs

OSHA 10/30 (OSHA CERTIFIED INSTRUCTOR)

➢ OSHA 10 (requires completion of 10 hours)
➢ OSHA 30 (requires completion of 30 hours)

APPRENTICE

Class/Lab Hours
8-210 (Job Number 2)

COMMERCIAL SKILLS

➢ Safety
- General Job-Site Safety Awareness
- First Aid/CPR Certification
- Emergency Procedures
- Compliance with OSHA, NFPA and EPA Regulations
- Substance Abuse Awareness

➢ Tools, Materials and Handling
- Proper Care and Use of Hand and Power Tools
- Proper Rigging Methods
- Proper Digging Techniques
- Proper Use of Motorized Equipment; Platform Lifts, Fork-Lifts and Bucket Trucks

- Proper Material Lifting and Handling

- Math
  - Appropriate Mathematical Calculations to Solve for Related Problems

- Electrical Theory
  - Basic Electro-Magnetic Principals
  - Ohm's Law
  - AC/DC Theory
  - Series, Parallel and Combination Circuits
  - Characteristics of Circuits; Voltage, Current, Power, Resistance, Impedance, Capacitance and Reactance
  - Theory of Superposition and Solving for Multiple Voltage-Sourced Circuits
  - Operation and Characteristics of Three-Wire Systems
  - Operation and Characteristics of Three-Phase Systems
  - Use of Electronics in the Electrical Industry
  - Code Requirements
  - National Electrical Code and Local Codes

- Conductors
  - General Characteristics
  - Conductor Installation Codes and Techniques
  - Methods for Selecting Proper Size and Type of Conductors

- Conduit and Raceways
  - Terms Associated with Conduits and Raceways
  - Procedures for Laying Out Various Types of Bends
  - Procedures for Making Proper Bends when Fabricating Conduits
  - Conduit Support Systems Recognized by Code

- First Aid/CPR

- Lighting Systems
  - Function, Operation and Characteristics of Various Lighting Systems
  - Lighting Distribution and Layout

- Installation and Connection of Fixtures
  - Over-Current Devices
  - Function, Operation and Characteristics of Over-Current Protection Devices
  - NEC Requirements for Over-Current Protection Devices
  - NEC Requirements for Ground-Fault and Arc-Fault Protection

- Grounding Systems
  - Functions, Operation and Characteristics of Grounding Systems
  - Sizing, Layout and Installation of Grounding Systems
  - Insulation and Isolation
  - Proper Grounding and Bonding techniques
  - Special Circumstances

- Services and Distribution Systems
  - Function, Operation and Requirements for Various Panel Boards and Switch Gear
  - Grounding Requirements
  - Code Requirements

- Prints and Specifications
  - Creation of Blueprints Plans and Specification
  - Use of Blueprints, Plans and Specification
  - Recognizing Information Contained within Blueprints

- Motors, Motor Controllers and Process Controllers
  - Function, Operation and Characteristics of Motors (AC, DC, Dual-Voltage)
  - Proper Motor Installations
  - Motor Controllers, Control Circuits and Control Devices
  - Control Transformers, Switches and Relays
  - Instrumentation, Process Control Systems and Devices

- Generation and Power Supplies
  - Principles of Generating Electricity
  - Principles of Alternative Energy Generating Systems
  - Installation and Maintenance of Uninterruptible Power Supplies
  - Installation and Maintenance of Emergency Battery Systems

- Transformers
  - Function, Operation and Characteristics of transformers
  - Selection and Installation of Transformer Types
  - Transformer Grounding Techniques
  - Harmonics and Power Quality

- Workplace Development
  - Orientation to Organization and Structures
  - Working Well with Others
  - Financial Skills

- Electrical Testing
  - Steps Used for Various Testing Processes
  - Proper Selection and Use of Test Meters
  - Utilizing the Results of Testing Procedures

- Specialty Systems
  - Fire Alarms
  - Security Systems

- CALCTP
  - Advanced Lighting Control Systems
  - Lighting Control Strategies
  - Line Voltage Switching Controls
  - Low Voltage Switching Control
  - Dimming Controls
  - Occupancy Sensors
  - Photosensors

- Electric Vehicle Infrastructure Training Program

OSHA 10 (OSHA CERTIFIED INSTRUCTOR)

- OSHA 10 (requires completion of 10 hours)

Safety training cannot exceed 10% of total training hours for any individual trainee. This 10% safety training cap does not apply to OSHA 10/30 training.

Note: Reimbursement for Job Number 1 Journeymen retraining is capped at 200 total training hours per trainee regardless of the method of training delivery. Reimbursement for Job Number 2 Apprenticeship training is capped at 200 total training hours per trainee in Commercial Skills and 10 hours of OSHA10 for a total of 210 hours regardless of the method of training delivery.

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Bay Area Counties Roofing and Waterproofing Industry Apprenticeship Training Fund

Agreement Number: ET16-0904

Panel Meeting of: August 28, 2015

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

PROJECT PROFILE

Contract Attributes:	Retrainee Apprenticeship Priority Rate	Industry Sector(s):	Construction Green Technology Priority Industry: ☒ Yes ☐ 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:	☒ Yes ☐ No
Union:	☒ Yes ☐ 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

Program Costs	+	Support Costs	=	Total ETP Funding
$279,900		$19,350 8%		$299,250

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

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Apprentice Local 40 West Bay Counties	Commercial Skills, Computer Skills, OSHA 10	50	8-210	0	$1,807	$20.55
				Weighted Avg: 130			
2	Retrainee Apprentice Local 81 East Bay and North Bay Counties	Commercial Skills, Computer Skills, OSHA 10	50	8-210	0	$1,807	$20.55
				Weighted Avg: 130			
3	Retrainee Apprentice Local 95 Santa Clara Valley Area	Commercial Skills, Computer Skills, OSHA 10	50	8-210	0	$1,807	$20.55
				Weighted Avg: 130			
4	Retrainee Priority Rate Journeyman	Commercial Skills, Computer Skills, OSHA 10/30	50	8-200	0	$564	$31.55
				Weighted Avg: 24			

Minimum Wage by County: Statewide (Priority Industry) $20.55 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 $5.32 per hour may be used to meet the Post-Retention Wage in Job Numbers 1-3 only.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Apprentice Roofer		150
Journeymen Roofer		50

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). Each program uses the same curriculum for training as Roofers and Waterproofers (Roofers).

However, 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). This will be the Panel's third Agreement with this joint JATC.

The Bay Area Roofers JATC is responsible for training approximately 400 Apprentices and 800 Journeymen in 14 Northern California Counties. Under its apprenticeship curriculum, each apprentice receives at least 304 hours in Related & Supplemental Instruction (RSI) and 4,000 hours in on-the-job training over a 3.5 year apprenticeship.

Employer Demand for Training

All training funded by ETP is designed to meet changing customer demands in the industry, as it moves away from traditional hot tar roofing systems. New products and green building systems require skills training on new equipment such as electronic leak/failure detection. 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.

In addition, employers are requiring training and certifications for Apprentice and Journeyman workers to insure safety and productivity. Certifications include OSHA 10/30, fall prevention, scaffold safety, torch application, rigging and signaling, handling hazardous materials, traffic flagging, and specialized training for manufacturing facility construction.

Finally, demand in the San Francisco Bay Area for roofers is strong. After the long recession, employment is now at 100% and employers have stated that they will need 20% more roofers in the near future for projects like Phase II of the Transbay Tunnel and the construction boom that continues to change the skyline of San Francisco. Every Apprentice needs to be ready to work immediately at high levels of productivity, and the JATC plans to bring more people into its apprenticeship program.

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). It is designed to supplement cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training.

RSI is delivered as class/lab, and ETP does not reimburse CBT delivery for apprenticeship training. The curriculum is developed with input from DAS and a designated Local Educational Agency (in this case Martinez Adult School and Metropolitan Education District). The Apprenticeship Program allows reimbursement for up to 200 hours of RSI plus OSHA10.

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. The 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 $5.00, reducing the priority industry rate from $18.00 to $13.00 per hour. ETP wage for Apprentices will be $20.55 per hour. This is the Special Employment Training Statewide for 2015 as modified for priority industries, which is being used for all apprentice occupation, for ease of administration.

DAS Completion Rates

The Panel approves projects for JATCs that perform within 50% of the industry standard. Using DAS Completion Rates for 2009-2013, the overall percentage of completion for the Roofing Industry trades averaged 21.0%.
Completion rates for each of the three union locals have been measured by DAS for the five-year time period 2009-2013 as follows:

- Local 40 West Bay Counties – 22.15% average (exceeds the industry average)
- Local 81 East Bay & North Bay Counties – 23.26% average (exceeds the industry average)
- Local 95 Santa Clara Counties -- 8.5% average (below 50%)

The Bay Area Roofers Trust states that the 8.5% rate for Local 95 occurred when one of the largest construction companies in Santa Clara declared bankruptcy. As hours of work dwindled, many apprentices in Local 95 were forced to leave the program for financial reasons. As such, according to DAS records, there are no other outstanding issues regarding retention.

PROJECT DETAILS

Bay Area Roofers seeks ETP funds for the training of 150 Apprentices and 50 Journeymen.

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 new 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 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.

Training Plan

Journeyman Training

Commercial Skills (85%): Journeymen will receive training in products and materials that are new to the industry such as advanced use of single-ply materials and systems, advanced waterproofing systems, complex maintenance and repair procedures, installation and maintenance of drainage systems, application of Title 24 standards, and special safety procedures for working around photovoltaic and other “green” roofs.

Computer Skills (5%): Journeymen will learn project management and computer skills, including building information modeling, estimating, and product application and testing.

OSHA 10/30 Skills (10%): Training is a series of courses "bundled" by industry sector and occupation. Typically, it is delivered to workers in the building trades. Under this proposal, OSHA 10 will be funded for Apprentices and OSHA 10/30 will be funded for Journeymen. 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. Completion of the training results in a certificate that expands employment opportunities. To ensure that each trainee receives certification, ETP will only consider payment earned upon completion of the full 10-hour or 30-hour course. OSHA 10/30 is not included in the 10% limitation on safety training.

Apprentice Training

Commercial Skills (85%): Apprentices will receive training in 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, and solar systems.

Computer Skills (5%): Training for apprentices also covers construction-related modeling and 3-D software applications.

OSHA 10 (10%) This training provides a complete overview of occupational safety and health so that apprentices become more knowledgeable about workplace hazards which are significant within the roofing and waterproofing industry.

Curriculum Development

Bay Area Roofers works directly with union 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. Assessments and recruitment will take place throughout the duration of the Agreement.

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.

RECOMMENDATION

Staff recommends approval of this proposal.

CURRENT CONTRACT PERFORMANCE

The following table summarizes performance by Bay Area Roofers JATC under the current ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees Estimated	No. Completed Training	No. Retained
ET14-0913	$299,250	03/03/14 – 03/02/16	Apprentice – 228 Journeymen-102	Apprentice – 209 Journeymen - 100	0

Based on the ETP tracking system to date, 20,502 reimbursable hours have been tracked (over 100% of the Agreement amount). The Contractor projects 100% earnings when the closeout invoice is processed by ETP.

PRIOR PROJECTS

The following table summarizes performance by the Bay Area Roofers JATC under an ETP Agreement completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET12-0349	Livermore	06/30/12–06/29/14	$482,120	$232,809 (48%)

Performance did not meet expectations for two reasons: 1) The term of contract coincided with changes in delivery methods and procedures at the training center in Livermore; and 2) Work availability in the Bay Area did not pick up as quickly as expected. 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 of this proposal for a flat fee of $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

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 single ply roofing
- Flashing materials
- Flat seam rooming
- Following plans and specifications
- Following project plans
- Green roofs
- Hot air welding for apprentices
- Insulation materials
- Low slope roofing
- Maintenance and repair
- Measurement and calculation problems in roofing
- Metal roofing
- Mopping operations
- 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 (OSHA CERTIFIED INSTRUCTOR)

- OSHA 10 (requires completion of 10 hours)

Journeymen

Class/Lab Hours

8-200

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
- 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 & testing
- Estimating systems
- Project management software

<u>OSHA 10/30</u> (OSHA CERTIFIED INSTRUCTOR)

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

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 1-3 Apprenticeship training is capped at 200 total training hours per trainee in Commercial Skills and 10 hours of OSHA10 for a total of 210 hours regardless of the method of training delivery. Reimbursement for Job Number 4 Journeymen retraining is capped at 200 total training hours per trainee regardless of the method of training delivery.

Training Proposal for:

San Francisco Electrical Industry Apprenticeship and Training Trust
Agreement Number: ET16-0903

Panel Meeting of: August 28, 2015

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

PROJECT PROFILE

Contract Attributes:	Retrainee Apprenticeship Priority Rate	Industry Sector(s):	Construction Green Technology Priority Industry: ☒ Yes ☐ No
County Served:	San Francisco	Repeat Contractor:	☒ Yes ☐ No
Union:	☒ Yes ☐ No International Brotherhood of Electrical Workers Local 6		
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		≤0%	

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
$627,200		$43,200 8%		$670,400

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

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Journeyman Priority Rate	Commercial Skills, Business, Computer Skills, OSHA 10/30	400	8-200	0	$564	$61.25
				Weighted Avg: 24			
2	Retrainee Apprentice Priority Rate	Commercial Skills, OSHA 10	160	8-210	0	$2,780	$27.56
				Weighted Avg: 200			

Minimum Wage by County: $20.55 per hour for SET Statewide priority industry.

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Journeymen Electrician (Inside Wireman)		400
Apprentice Electrician (Inside Wireman)		160

INTRODUCTION

Established in 1962, the San Francisco Electrical Industry Joint Apprenticeship and Training Trust (SF Electrical JATC) www.sfelectricaltraining.org is a cooperative effort between the San Francisco Chapter of the National Electrical Contractors Association (NECA) and the International Brotherhood of Electrical Workers (IBEW) Local Union 6. SF Electrical JATC serves approximately 398 Apprentices (twice the number as in 2014) and 1,200 Journeymen. [Note: Apprentice funding is well under the program-sponsor cap of $450,000. The bulk of ETP funding will be used for Journeyman training, with the overall MEC cap of $950,000.] 670 employers are signatory to the collective bargaining agreement. Approximately 70% of these employers are small businesses. Participating employers perform specialized construction work related to the design, installation, and maintenance of electrical systems.

SF Electrical JATC is charged with the responsibility of recruiting and training apprentices to meet the ever-growing needs of San Francisco's electrical industry. Additionally, the JATC provides skills update and improvement courses to Journeymen. The JATC's training program keeps Journeymen technologically current in various fields including high-voltage power transmission to low-voltage lighting, a major component of green technology. Training includes new electrical standards set out in the State's Title 24 laws. For electricians, this law mandates the use of automated lighting control devices and automatic plug load circuit controls. This legislation continues to require changes in how lighting and energy is used and documented.

EMPLOYER DEMAND FOR TRAINING

The local hiring demands of the City and County of San Francisco have been considered for this funding request. Large and small infrastructure projects continue to generate the need for electricians with the ability to work on more technically advanced construction projects. SF Elecrical JATC Journeymen and Apprentices are working on numerous large residential and public commercial projects during the next two years. Examples include Bayview/Hunters Point Shipyard/Candlestick Point, Treasure Island, Pier 70, Park Merced, CPMC Cathedral Hill, and Transbay Terminal.

Apprenticeship Program

The Panel is authorized to fund Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). The Panel adopted the Apprenticeship Training Program as a pilot in March 2012. It is designed to supplement cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training.

Apprenticeships are a multi-year training program that results in DAS certification to work as a Journeyman. They are authorized in California under the Shelly-Maloney Apprenticeship Labor Standards Act of 1939. Apprentices commit to training under contract with an apprenticeship program sponsor. They advance through a series of apprenticeship levels as they complete modules of RSI and on-the-job training. Wages are paid for hours worked on the job, in progression with a series of advancements up to the Journeyman level.

Apprentice programs are typically sponsored by a Joint Apprenticeship Training Committee (JATC). A JATC is created through collective bargaining, with an equal number of members appointed by union and management, with employer contributions to a training trust fund.

Depending on the type of trade, apprenticeship programs vary in length, typically from 2-6 years. They also vary in size, ranging from less than 10 to several hundred apprentices at any given point in time. Several types of trainees are eligible under the Apprenticeship Program: Apprentices (second-year), Journeymen and Pre-Apprentices. First-year Apprentices are not eligible due to the higher drop-out rates associated with this entry-level.

ETP funding flows through a Multiple Employer Contract (MEC), in this proposal held by the trust for a JATC. The employers are not “participants” but are signatories to the Collective Bargaining Agreement.

RSI is traditionally delivered as class/lab, and ETP does not reimburse CBT delivery for apprenticeship training. The curriculum is developed with input from DAS and a designated Local Educational Agency; in this proposal the LEA is Foothill College. The Apprenticeship Program allows reimbursement for up to 200 hours of RSI plus OSHA10, per-apprentice.

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.

Because ETP funding cannot displace another source of government funds, the fixed fee rate is reduced by $5.00 to account for adult education funding appropriated each year for Apprentice training through the California Community College Chancellor’s Office and Department of

Education. This changes the ETP Priority Industry Rate from $18.00 to $13.00 per hour for all Apprentice Job Numbers.

In addition, the Panel adopted a "blended rate" for Journeymen, reflecting the fact that they may be employed by a variety of contractors over the two-year term of contract ranging from large employers, to small (≤100 employees). This blended rate is $22 per hour, midway between the Priority Industry standard rate ($18) and Small Business rate ($26).

Under the Apprenticeship Training Program, the post-retention wage has been standardized to a minimum of $20.55 per hour reflecting the Special Employment Training (SET) wage for a Priority Industry. This wage was chosen for ease of administration, recognizing that most Apprentices and all Journeymen exceed the highest ETP wage requirements. However, the actual wages are shown in the Training Plan Table and contract if they exceed $20.55.

DAS Completion Rates

The completion rate for this DAS-approved program for 2009-2013 is 78.10% and exceeds the industry completion percentage of 66.13%. This meets ETP standards.

PROJECT DETAILS

Training Plan

All training outlined in this proposal will be center-based, classroom/laboratory training occurring at the JATC's training facility in San Francisco.

Journeyman Training:

Commercial Skills (80%) – Electrician/Inside Wiremen install, maintain and repair various types of electrical and electronic equipment in commercial, industrial and residential establishments. They also learn to install, connect, and test electrical wiring systems for lighting, heating, air conditioning, and communications in any building or structure. In San Francisco, industry is undergoing significant change due to the emergence of green technology. Green training is expected to be the centerpiece of the new program because of the demand for energy efficient construction methods and technologies. The shift from analog to digital equipment also dictates the need for extensive retraining.

Business Skills (5%) - Trainees must understand new national building codes and green practices; follow certification guidelines; use more collaborative bidding and project development practices; meet budgets; interact with various types of construction workers; and implement green solutions in traditional work environments. ETP-funded training will give workers the tools to plan, organize, and manage their construction projects more efficiently. Training will also include teambuilding and leadership skills so that electricians can lead teams in an effective and efficient manner.

Computer Skills (5%) - 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 (10%)

OSHA 10/30 training is typically delivered to workers in the building trades. It consists of 10 hours of training for Apprentices, and 10 or 30 hours of training for Journeymen.

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.

Completion of the training results in a certificate that expands employment opportunities. To ensure that each trainee receives certification, ETP will only consider payment earned upon completion of the full 10-hour course.

Apprenticeship Training

Commercial Skills (95%) The Inside Wireman Apprenticeship is a 5-year program comprised of school and hands-on training. The apprentice electrician works directly under the supervision of a qualified journeyman electrician and assists with installing and/or maintaining a variety of approved wiring methods for distribution of electrical light, heat, power, radio and signaling utilization systems.

OSHA 10 (5%) This training provides a complete overview of occupational safety and health so that construction workers are more knowledgeable about workplace hazards.

Curriculum Development

The Apprentice program uses the National Joint Apprenticeship and Training Committee's Curriculum which was developed for the exclusive use of IBEW-NECA. The Journeyman upgrade Curriculum is employer-driven to meet the needs of signatory San Diego and Imperial County employers. The Curriculum was developed and customized with input from both labor and management representatives to address the local needs of union members, participating employers, and the industry as a whole.

Trainer Qualifications

SF Electrical JATC employs 4 full and 18 part-time trainers. All trainers are former or current members of the trade and the director of the school has received Master Certification status by the National Joint Apprenticeship and Training Committee. In addition, all instructors meet standards set by the LEA.

Impact/Outcome

Upon successful completion of the program, each Apprentice will receive Certificates of Completion from the State of California DAS, the Department of Labor, the National Joint Apprenticeship and Training Committee for the Electrical Industry, and Foothill College. Apprentices may also receive an OSHA 10 certification.

Certifications for Journeymen may include OSHA 10/30, Arc Flash Safety Awareness, Building Automation Systems, Green Audits, California Advanced Lighting Control Program (CALCTP) Installer and Lighting Acceptance Testing, and Title 24 Lighting Installation and Codes.

Commitment to Training

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.

Marketing and Support Costs

The JATC is requesting 8% in support costs to fund its staff in recruiting and qualifying additional participating employers for this program. JATC staff also assist with the marketing, recruitment, and needs assessments of trainees and employers.

The JATC will publicize its training through brochures/flyers, personal contacts, the web, public service announcements and presentations at labor-management meetings and industry assemblies. While many participating employers have already been recruited, additional recruitment and assessment activities are still required. The JATC reports that its projected budget costs for personnel alone will exceed the ETP support cost funding. Staff recommends 8% support costs for the SF Electrical JATC.

Tuition Reimbursement

SF Electrical JATC 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.

CURRENT CONTRACT PERFORMANCE

The following table summarizes performance by SF Electrical JATC under its current ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees Estimated	No. Completed Training	No. Retained
ET14-0914	$405,376	03/03/2014 – 03/02/2016	Apprentice – 107 Journeymen-102	Apprentice – 59 Journeymen - 122	17

Based on the ETP tracking system, 36,385 reimbursable hours have been entered, sufficient to earn 100% of funding.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET13-0916	San Francisco	10/29/12 – 10/28/14	$340,178	$340,178 (100%)
ET10-0215	San Francisco	09/28/09 – 09/27/11	$184,450	$21,875 (12%)

ET10-0215 was approved by the Panel prior to the establishment of the Apprenticeship Pilot program and thus focused on Journeymen training. Funds earned were lower than anticipated because Journeymen electricians, who often are employed at later stages of construction, were still experiencing less than full-employment.

DEVELOPMENT SERVICES

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

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

N/A

Exhibit B: Menu Curriculum

Class/Lab Hours **JOURNEYMAN**
8-200 (Job 1)

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 (AC/DC) Principles
- Math for Electricians
- Ohm's Law
- Generators
- Inductance/Reactance
- Series/Parallel Circuits

Grounding
- Grounding and Bounding
- 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 (PLC)
- 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
- Solar Panel Installation
- Solar Photovoltaics
- Building Automation Systems
- Confined Space Entry
- Specialized Tools
- Conduit Bending
- Rigging and Lifting
- Firestop Installation
- Blueprints and Schematics
- Work Flow and Resources
- Proper Installation and Use of Testing and Auditing Materials and Equipment (Green Training)
- Understanding New Technologies and Changes to Industry Standards (Green Training)
- Proper Equipment Set-Up (Green Training)
- Safe Working Practices (Training is capped 10% of a trainee's total hours)
- Advanced Instrumentation and Motor Controls
- Programmable Logic Controllers
- Advanced Welding
- Architecture Designs and Advanced Plan Reading
- Management and Monitoring of Materials
- Testing Materials and Equipment – Proper Set-Up and Use (Green Training)
- Understanding Changes to Industry Standards (Green Training)

CALCTP (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 (EVITP)

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 (AutoCAD)
- Job Tracking System
- Scheduling & Planning Jobs

OSHA 10/30 (OSHA CERTIFIED INSTRUCTOR)
- OSHA 10 (requires completion of 10 hours)
- OSHA 30 (requires completion of 30 hours)

APPRENTICE

Class/Lab Hours
8-210 (Job Number 2) Trainees may receive any of the following:

COMMERCIAL SKILLS

Safety
- General job-site safety awareness
- First Aid/CPR Certification
- Emergency Procedures
- Compliance with OSHA, NFPA and EPA Regulations
- Substance Abuse Awareness

Tools, Materials and Handling

- Proper care and use of hand and power tools
- Proper rigging methods
- Proper digging techniques
- Proper use of motorized equipment; platform lifts, fork-lifts and bucket trucks
- Proper material lifting and handling

Math
- Appropriate mathematical calculations to solve for related problems.

Electrical Theory
- Basic electro -magnetic principals
- Ohm's Law
- AC/DC Theory
- Series, Parallel and Combination Circuits
- Characteristics of circuits; voltage, current, power, resistance, impedance, capacitance and reactance.
- Theory of superposition and solving for multiple voltage-sourced circuits
- Operation and characteristics of three-wire systems
- Operation and characteristics of three-phase systems
- Use of electronics in the electrical industry
- Code Requirements
- National Electrical Code and Local Codes

Conductors
- General characteristics
- Conductor installation codes and techniques
- Methods for selecting proper size and type of conductors

Conduit and Raceways
- Terms associated with conduits and raceways
- Procedures for laying out various types of bends
- Procedures for making proper bends when fabricating conduits
- Conduit support systems recognized by Code

First Aid/CPR

Lighting Systems
- Function, operation and characteristics of various lighting systems
- Lighting distribution and layout

Installation and connection of fixtures
- Over-current Devices
- Function, operation and characteristics of over-current protection devices
- NEC requirements for over-current protection devices

- NEC requirements for ground-fault and arc-fault protection

Grounding Systems
- Functions, operation and characteristics of grounding systems
- Sizing, layout and installation of grounding systems
- Insulation and isolation
- Proper grounding and bonding techniques
- Special circumstances

Services and Distribution Systems
- Function, operation and requirements for various panel boards and switch gear
- Grounding requirements
- Code requirements

Prints and Specifications
- Creation of blueprints plans and specification
- Use of blueprints, plans and specification
- Recognizing information contained within blueprints

Motors, Motor Controllers and Process Controllers
- Function, operation and characteristics of motors (AC, DC, Dual-Voltage)
- Proper motor installations
- Motor controllers, control circuits and control devices
- Control Transformers, switches and relays
- Instrumentation, process control systems and devices

Generation and Power Supplies
- Principles of generating electricity
- Principles of Alternative Energy Generating Systems
- Installation and maintenance of uninterruptible power supplies (UPS)
- Installation and maintenance of emergency battery systems

Transformers
- Function, operation, and characteristics of transformers
- Selection and installation of transformer types
- Transformer grounding techniques
- Harmonics and power quality

Workplace Development
- Orientation to organization and structures
- Working well with others
- Financial Skills

Electrical Testing
- Steps used for various testing processes
- Proper selection and use of test meters

- Utilizing the results of testing procedures

Specialty Systems
- Fire Alarms
- Security Systems

CALCTP
- Advanced Lighting Control Systems
- Lighting Control Strategies
- Line Voltage Switching Controls
- Low Voltage Switching Control
- Dimming Controls
- Occupancy Sensors
- Photosensors

Electric Vehicle Infrastructure Training Program (EVITP)

OSHA 10 (OSHA CERTIFIED INSTRUCTOR)
- OSHA 10 (requires completion of 10 hours)

Note: Reimbursement for Job Number 1 Journeymen retraining is capped at 200 total training hours per trainee regardless of the method of training delivery. Reimbursement for Job Number 2 Apprenticeship training is capped at 200 total training hours per trainee in Commercial Skills and 10 hours of OSHA10 for a total of 210 hours regardless of the method of training delivery. 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.

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Santa Clara County Electrical Joint Apprenticeship and Training Trust

Agreement Number: ET16-0905

Panel Meeting of: August 28, 2015

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

PROJECT PROFILE

Contract Attributes:	Retrainee Apprenticeship Priority Rate	Industry Sector(s):	Construction Green Technology Priority Industry: ☒ Yes ☐ No
County Served:	Santa Clara	Repeat Contractor:	☒ Yes ☐ No
Union:	☒ Yes ☐ No International Brotherhood of Electrical Workers (IBEW) Local 332		
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		N/A	

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
$521,600		$36,000 8%		$557,600

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, Business Skills, Computer Skills, OSHA 10/30	200	8-200	0	$564	$31.97
				Weighted Avg: 24			
2	Retrainee Apprentice Priority Rate	Commercial Skills, OSHA 10	160	8-210	0	$2,780	$20.78
				Weighted Avg: 200			

Minimum Wage by County: $20.55 per hour for SET Statewide priority industry.

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

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

Health benefits are provided but are not needed to meet the post-retention wages.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Journeyman Electrician/Inside Wireman		180
Apprentice Electrician/Inside Wireman		132
Journeyman Residential Electrician		20
Apprentice Residential Electrician		28

INTRODUCTION

The Santa Clara County Electrical Joint Apprenticeship and Training Trust (Santa Clara JATT) (www.ejatc33w.org) was founded in 1958. The trust is funded through collective bargaining between signatory employers that are members of the National Electrical Contractors Association (NECA) and the International Brotherhood of Electrical Workers (IBEW) Local 332.

Santa Clara JATT currently serves approximately 363 Apprentices (an increase of 104 apprentices from 2014) and 1,119 Journeymen. There are 346 employer signatories to the collective bargaining agreement. The JATT sponsors two apprenticeship programs: Inside Wireman (5 years) and Residential Electrician (3 years). The trainees learn to work on electrical panels, wiring, conduit, piping, test equipment, transformers, motors, grounding, over-current protection, security, solar home systems, home automation systems, and power distribution systems.

The JATT provides skills upgrade courses to keep Journeymen technologically current. Journeymen need new certifications and skills to install, maintain, and integrate a wide variety of evolving systems. In addition, the JATC must prepare Journeymen and Apprentices to meet new electrical standards set out in the State's Title 24 laws.

EMPLOYER DEMAND FOR TRAINING

Apprentices and Journeymen will work in Silicon Valley, building and maintaining facilities for California's high technology companies. High profile projects include the ongoing expansion of Apple Corporation headquarters which is estimated to require up to 500 electricians working under three different construction contractors. There is also the BART extension into San Jose; the Lucille Packard Children's Hospital expansion; the new Stanford Hospital; Veteran's Administration hospital construction; and the Santa Clara Square office, retail, and residential development.

This proposal will emphasize advanced training to meet local employer demand for specialized skills and critical employer-mandated certifications. In addition, both Apprentices and Journeymen will gain skills in emerging technologies focusing on clean energy, the shift from analog to digital equipment, testing and auditing equipment, and new programmable control systems.

Apprenticeship Program

The Panel is authorized to fund Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). The Panel adopted the Apprenticeship Training Program as a pilot in March 2012. It is designed to supplement cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training.

Apprenticeships are a multi-year training program that results in DAS certification to work as a Journeyman. They are authorized in California under the Shelly-Maloney Apprenticeship Labor Standards Act of 1939. Apprentices commit to training under contract with an apprenticeship program sponsor. They advance through a series of apprenticeship levels as they complete modules of RSI and on-the-job training. Wages are paid for hours worked on the job, in progression with a series of advancements up to the Journeyman level.

Apprentice programs are typically sponsored by a Joint Apprenticeship Training Committee (JATC). A JATC is created through collective bargaining, with an equal number of members appointed by union and management, with employer contributions to a training trust fund. The employers are not "participants" but are signatories to the Collective Bargaining Agreement. As in this proposal, a joint trust may administer two or more apprenticeship programs.

Depending on the type of trade, apprenticeship programs vary in length, typically from 2-6 years. They also vary in size, ranging from less than 10 to several hundred apprentices at any given point in time. Several types of trainees are eligible under the Apprenticeship Program: Apprentices (second-year), Journeymen and Pre-Apprentices. First-year Apprentices are not eligible due to the higher drop-out rates associated with this entry-level.

RSI is traditionally delivered as class/lab, and ETP does not reimburse CBT delivery for apprenticeship training. The curriculum is developed with input from DAS and a designated Local Educational Agency (LEA); in this proposal the LEA is Foothill Community College. The Apprenticeship Program allows reimbursement for up to 200 hours of RSI plus OSHA10, per-apprentice.

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.

Because ETP funding cannot displace another source of government funds, the fixed fee rate is reduced by $5 to account for adult education funding appropriated each year for Apprentice training through the California Community College Chancellor's Office and Department of Education. This changes the ETP Priority Industry Rate from $18 to $13 per hour for all Apprentice Job Numbers.

In addition, the Panel adopted a "blended rate" for Journeymen, reflecting the fact that they may be employed by a variety of contractors over the two-year term of contract ranging from large to small employers. The rate is $22 per hour, midway between the Priority Industry standard rate ($18) and Small Business rate ($26). [Note: This "blended rate" has been extended to Pre-Apprentices, for ease of administration.]

Under the Apprenticeship Training Program, the post-retention wage has been standardized to a minimum of $20.55 per hour reflecting the Special Employment Training (SET) wage for a Priority Industry. This wage was chosen for ease of administration, recognizing that most Apprentices and all Journeymen exceed the highest ETP wage requirements. However, the actual wage is displayed in the Training Plan Table and contract, if it exceeds $20.55.

DAS Completion Rates

The completion rate for this DAS-approved program for the most recent five year period (2009-2013) is 78.10% and exceeds the industry completion percentage of 66.13% for that same time period.

PROJECT DETAILS

Training Plan

All class/lab training is center-based and will be delivered at the JATT Santa Clara Training Center in San Jose. This is a 30,000 sq. ft., state-of-the-art facility with numerous computer and technical labs in addition to classrooms.

Journeyman Training:

Commercial Skills (80%) – This training will improve electrician skills installing, maintaining and repairing various types of electrical and electronic equipment in commercial, industrial and residential establishments. They will also learn advanced skills for installing, connecting, and testing electrical wiring systems for lighting, heating, air conditioning, and communications in any building or structure. Trainees may receive specialized training that may include courses leading to certification. Santa Clara JATT has been certified by Electric Power Research Institute as the only nationally-certified lab and testing facility in northern California to certify Level B Technicians.

Business Skills (5%) - This training will focus on using more collaborative bidding and project development practices; meeting budgets; interacting with other types of construction workers; and implementing green solutions in traditional work environments. The proposed training will give trainees the tools to plan, organize, and manage construction projects so that they can complete them efficiently and on time. Training will also include team-building and leadership skills so that electricians can participate and lead teams in an effective and efficient manner.

Computer Skills (5%) - 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.

Apprenticeship Training

Commercial Skills (90%)

Inside Wireman Apprentices will 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. The Inside Wireman Apprentice program is a five-year training program.

Residential Wireman Apprentices will learn to install and connect electrical systems in homes, condos and apartments. Today's homes are being equipped with computer networks, energy management systems, security systems, fire alarm systems, and new power distribution systems. Residential Wiremen must have the knowledge and the skills necessary to make these systems work for today's homeowner. The Residential Wireman apprentices complete a three-year training program.

Curriculum Development

Santa Clara JATT, with input from both labor and management representatives, has developed and customized the national electrical curriculum to address the local needs of its members, participating employers, and the construction industry. The apprentice program uses the National Joint Apprenticeship and Training Committee's Curriculum 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. Local hiring demands in Santa Clara County include the need for electricians with the ability to work with green materials on more technically advanced construction projects. Feedback on the curricula comes directly from employers and union representatives based on workplace performance, customer requests, the industry and course evaluations completed by trainees.

Trainer Qualifications

All trainers are former or current members of the trade and some have received Master Certification status by the National Joint Apprenticeship and Training Committee. In addition, all instructors meet standards set by the LEA.

Impact/Outcome

Upon successful completion of the apprenticeship program, each Apprentice will receive Certificates of Completion from: National Santa Clara Electrical JATT; State of California DAS; and from Foothill Community College. Apprentices also receive an OSHA 10 certification upon completion of training.

Certifications for journeymen may include OSHA 10/30, Arc Flash Safety Awareness, Building Automation Systems, Green Audits, California Advanced Lighting Control Program (CALCTP) Installer and Lighting Acceptance Testing, and Title 24 Lighting Installation and Codes.

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.

Marketing and Support Costs

Santa Clara JATT is requesting 8% in support costs to fund recruiting and qualifying additional participating employers for this program. There are five staff people in the JATC office assisting with the marketing, recruitment, and needs assessments.

Program information is disseminated through direct mailings, informational flyers, personal contacts, telephone calls, public service announcements, emails, and the website throughout the year to electricians as well as to the electrical contractors who employ them. While many participating employers have already been recruited, additional recruitment and assessment activities are ongoing to support apprenticeship training and refine journeymen training courses. Staff recommends 8% support costs.

Tuition Reimbursement

In accordance with Title 22, CCR, Section 4412.1, Santa Clara JATT 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.

CURRENT CONTRACT PERFORMANCE

The following table summarizes performance by Santa Clara JATT under its current ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees Estimated	No. Completed Training	No. Retained
ET14-0915	$328,640	03/03/2014 – 03/02/2016	Apprentice – 103 Journeymen-75	Apprentice – 194 Journeymen - 69	92

Based on the ETP tracking system, 33,335 reimbursable hours have been tracked, sufficient to earn 100% of funding.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET13-0913	San Jose	10/22/12 – 10/21/14	$360,907	$360,907 (100%)

DEVELOPMENT SERVICES

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

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

N/A

Exhibit B: Menu Curriculum

Class/Lab Hours
8-200 (Job Number 1)

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 (AC/DC) Principles
- Math for Electricians
- Ohm's Law
- Generators
- Inductance/Reactance
- Series/Parallel Circuits

Grounding
- Grounding and Bounding
- 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 (PLC)
- 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
- Solar Panel Installation
- Solar Photovoltaics
- Building Automation Systems
- Confined Space Entry
- Specialized Tools
- Conduit Bending
- Rigging and Lifting
- Firestop Installation
- Blueprints and Schematics
- Work Flow and Resources
- Proper Installation and Use of Testing and Auditing Materials and Equipment (Green Training)
- Understanding New Technologies and Changes to Industry Standards (Green Training)
- Proper Equipment Set-Up (Green Training)
- Safe Working Practices
- Advanced Instrumentation and Motor Controls
- Programmable Logic Controllers
- Advanced Welding
- Architecture Designs and Advanced Plan Reading
- Management and Monitoring of Materials
- Testing Materials and Equipment – Proper Set-Up and Use (Green Training)
- Understanding Changes to Industry Standards (Green Training)

CALCTP (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 (EVITP)

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 (AutoCAD)
- Job Tracking System
- Scheduling & Planning Jobs

OSHA 10/30 (OSHA CERTIFIED INSTRUCTOR)

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

Class/Lab Hours
8-210 (Job Number 2)

Trainees may receive any of the following:

Apprentice

COMMERCIAL SKILLS

Safety

- General Job-Site Safety Awareness
- First Aid/CPR Certification
- Emergency Procedures
- Compliance with OSHA, NFPA and EPA Regulations
- Substance Abuse Awareness

Tools, Materials and Handling

- Proper Care and Use of Hand and Power Tools
- Proper Rigging Methods

- Proper Digging Techniques
- Proper Use of Motorized Equipment: Platform Lifts, Fork Lifts and Bucket Trucks
- Proper Material Lifting and Handling

Math
- Appropriate Mathematical Calculations to Solve for Related Problems.

Electrical Theory
- Basic Electro-Magnetic Principals
- Ohm's Law
- AC/DC Theory
- Series, Parallel and Combination Circuits
- Characteristics of Circuits: Voltage, Current, Power, Resistance, Impedance, Capacitance and Reactance.
- Theory of Superposition and Solving for Multiple Voltage-Sourced Circuits
- Operation and Characteristics of Three-Wire Systems
- Operation and Characteristics of Three-Phase Systems
- Use of Electronics in the Electrical Industry
- Code Requirements
- National Electrical Code and Local Codes

Conductors
- General Characteristics
- Conductor Installation Codes and Techniques
- Methods for Selecting Proper Size and Type of Conductors

Conduit and Raceways
- Terms Associated with Conduits and Raceways
- Procedures for Laying Out Various Types of Bends
- Procedures for Making Proper Bends When Fabricating Conduits
- Conduit Support Systems Recognized by Code

First Aid/CPR

Lighting Systems
- Function, Operation and Characteristics of Various Lighting Systems
- Lighting Distribution and Layout

Installation and Connection of Fixtures
- Over-Current Devices
- Function, Operation and Characteristics of Over-Current Protection Devices
- NEC Requirements for Over-Current Protection Devices
- NEC Requirements for Ground-Fault and Arc-Fault Protection

Grounding Systems
- Functions, Operation and Characteristics of Grounding Systems
- Sizing, Layout and Installation of Grounding Systems

- Insulation and Isolation
- Proper Grounding and Bonding Techniques
- Special Circumstances

Services and Distribution Systems
- Function, Operation and Requirements for Various Panel Boards and Switch Gear
- Grounding Requirements
- Code Requirements

Prints and Specifications
- Creation of Blueprints, Plans and Specification
- Use of Blueprints, Plans and Specification
- Recognizing Information Contained Within Blueprints

Motors, Motor Controllers and Process Controllers
- Function, Operation and Characteristics of Motors (AC, DC, Dual-Voltage)
- Proper Motor Installations
- Motor Controllers, Control Circuits and Control Devices
- Control Transformers, Switches and Relays
- Instrumentation, Process Control Systems and Devices

Generation and Power Supplies
- Principles of Generating Electricity
- Principles of Alternative Energy Generating Systems
- Installation and Maintenance of Uninterruptible Power Supplies (UPS)
- Installation and Maintenance of Emergency Battery Systems

Transformers
- Function, Operation, and Characteristics of Transformers
- Selection and Installation of Transformer Types
- Transformer Grounding Techniques
- Harmonics and Power Quality

Workplace Development
- Orientation to Organization and Structures
- Working Well With Others
- Financial Skills

Electrical Testing
- Steps Used for Various Testing Processes
- Proper Selection and Use of Test Meters
- Utilizing the Results of Testing Procedures

Specialty Systems
- Fire Alarms
- Security Systems

CALCTP
- Advanced Lighting Control Systems

- Lighting Control Strategies
- Line Voltage Switching Controls
- Low Voltage Switching Control
- Dimming Controls
- Occupancy Sensors
- Photosensors

Electric Vehicle Infrastructure Training Program (EVITP)

OSHA 10 (OSHA CERTIFIED INSTRUCTOR)

- OSHA 10 (requires completion of 10 hours)

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 for Job Number 1 and 210 total training hours for Job Number 2, regardless of method of delivery.

Training Proposal for:

State Building & Construction Trades Council of California

Agreement Number: ET16-0906

Panel Meeting of: August 28, 2015

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

PROJECT PROFILE

Contract Attributes:	Retrainee Apprenticeship Priority Rate	Industry Sector(s):	Construction Green Technology Priority Industry: ☒ Yes ☐ No
County Served:	Statewide	Repeat Contractor:	☒ Yes ☐No
Union:	☒ Yes ☐ No Various unions.		
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		N/A	

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
$598,320		$41,400 8%		$639,720

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, Computer Skills, Business Skills, OSHA 10/30	40	8-200	0	$564	$23.78
				Weighted Avg: 24			
2	Retrainee Apprentice Sheet Metal Worker-Local 273	Commercial Skills, OSHA 10	39	8-210	0	$2,780	$22.28
				Weighted Avg: 200			
3	Retrainee Apprentice Bricklayer and Allied Crafts Worker-Local 18	Commercial Skills, OSHA 10	50	8-210	0	$2,780	$20.55
				Weighted Avg: 200			
4	Retrainee Apprentice Electricians-Local 639	Commercial Skills, OSHA 10	33	8-210	0	$2,780	$21.62
				Weighted Avg: 200			
5	Retrainee Apprentice Electricians-Local 180	Commercial Skills, OSHA 10	50	8-210	0	$2,780	$21.62
				Weighted Avg: 200			
6	Retrainee Apprentice Electricians-Local 551	Commercial Skills, OSHA 10	50	8-210	0	$2,780	$21.62
				Weighted Avg: 200			

Minimum Wage by County: SET/Priority Industry: $20.55 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 $0.34 may be used to meet the post-retention wage for Apprentices in Job Number 3.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Journeyman Electrician/Inside Wireman		27
Journeyman Sheet Metal Worker		3
Journeyman Bricklayer and Allied Crafts Worker (Tile Finisher, Marble Finisher, Terrazzo Finisher, Terrazzo Worker, Tile Setter)		10
Apprentice Electrician/Wireman		133
Apprentice Sheet Metal Worker		39
Apprentice Bricklayer and Allied Crafts Worker (Tile Finisher, Marble Finisher, Terrazzo Finisher, Terrazzo Worker, Tile Setter)		50

*Wages vary by union local.
**This is the lowest base wage among the various Journeyman occupations.
***Apprentice wages vary by occupation.

INTRODUCTION

The State Building & Construction Trades Council of California (SBCTC) www.sbctc.org proposes to retrain journeyman and apprentice construction trades workers to support California's energy efficiency goals and Project Labor Agreement (PLA) initiatives.

SBCTC reports that it represents more than 400,000 unionized construction workers in California. It has 175 affiliated local unions from 13 crafts and 22 county and multi-county Building Trades Councils. The SBCTC works closely with the California Apprenticeship Coordinators Association which is the network of joint union-employer training programs or JATCs operating across the state. SBCTC also consults with a wide range of employer organizations representing small businesses, and major construction industry employers based in California. The construction industry to be served under this Agreement is designated as a Priority Industry by the Panel. SBCTC meets ETP eligibility requirements as a trade association.

This will be SBCTC's second ETP Agreement. This project acts as an incubator for smaller apprenticeship programs that do not have the staff capacity to hold an ETP contract. (For example, many of the JATCs listed in this project have just a part-time administrative assistant or none at all.) The eventual goal will be to "graduate" JATCs into individual ETP contracts (graduating includes an evaluation of ETP performance and improvements in the DAS completion rate). Only one JATC from the previous Agreement has graduated.

Seven JATCs participated in SBCTC's previous contract; four successfully completed training and retention. These four programs (San Luis Obispo County JATT; Napa-Solano Counties Electrical Industry ATT; Joint Electrical Industry Training Program Fund for Marin, Sonoma, Lake, and Mendocino Counties; and Tile, Marble and Terrazzo Employees JATC) have requested to participate again in this new proposal along with a new fifth program, Tri-Counties Sheet Metal Workers JAC.

SBCTC targets trades that are influential in helping California's green economy develop, such as electricians who set up solar power systems, sheet metal workers who service more fuel-efficient air systems and bricklayers and allied craft workers who build and retrofit buildings with safe and energy efficient products. Apprentices and journeymen in this project will build, service, and retrofit geothermal power plants, hospitals, residences, public K-12 schools, universities, community colleges, court houses, police stations, power generators, prisons, refineries, wind generation projects, wineries, office buildings and casinos. These workers plan, install, build, repair, monitor and maintain equipment that provides light, heat, communications, water and power.

Participating JATCs, LEAs, and DAS Completion Rates by JATC

Job Number 1 will fund Journeymen training. Job Numbers 2-6 will fund Apprentice training. The geographic area, affiliated union, occupation(s), LEA, and DAS Completion Rate for each of the five JATCs (respectively) are as follows:

Job No. 2:

- Tri-Counties Sheet Metal Workers JAC
- Ventura, Santa Barbara, and San Luis Obispo Counties
- Sheet Metal Workers International Association Local Union No. 273
    - Sheet Metal Worker (Five-year Program)
- Ventura County Office of Education, Regional Occupational Program
- 56.48% (Industry Standard of 68.10%)

Job No. 3:

- Tile, Marble, and Terrazzo Employees JATC
- Los Angeles, Orange, Ventura, Santa Barbara, San Luis Obispo, San Bernardino, Riverside, Inyo, Mono, San Diego, and Imperial Counties
- International Union of Bricklayers & Allied Craftworkers Local No. 18
    - Tile Finisher (Two-year Program)
    - Marble Finisher (Two-year Program)
    - Terrazzo Finisher (Four-year Program)
    - Terrazzo Worker (Three-year Program)
    - Tile Setter (Four-year Program)
    - Bricklayer (Four-year Program)
- Sweetwater Union High School District Division of Adult Education-Montgomery Adult School
- 50.73% (Industry Average of 38.58%)

Job No. 4:

- San Luis Obispo County JATT
- San Luis Obispo County
- IBEW Local No. 639
    - Electrician/Inside Wireman (Five-year Program)
- Los Angeles Unified School District, Division of Adult and Career Education
- 62.86% (Industry Average of 66.31%)

Job No. 5:

- Napa-Solano Counties Electrical Industry ATT
- Napa and Solano Counties
- IBEW Local No. 180
    - Electrician/Inside Wireman (Five-year Program)
- Napa Valley Unified School District, Napa Valley Adult Education
- 74.10% (Industry Average of 66.31%)

Job No. 6:

- Redwood Empire JATC
- Marin, Sonoma, Lake and Mendocino Counties
- IBEW Local No. 551
    - Electrician/Inside Wireman (Five-year Program)
- Santa Rosa Junior College
- 54.33% (Industry Average of 66.31%)

Up to 250 signatory employers will participate in this project; approximately 70% are Small Business. The vast majority of training hours will be dedicated to Apprenticeship (approximately 97% of total funding).

Employer Demand for Training

Participating employers have identified the need for more training so that they can reduce costs and meet complex and stringent quality and safety standards. In addition, in order to successfully bid on public works construction projects, employers must meet the requirement of local governments affected by Project Labor Agreements that require all new public works projects with state funding to use union construction workers. Recently, there have been significant levels of new construction projects planned including:

Southern California

- $1.6 billion: Port of Los Angeles
- $125 million: Martin Luther King Medical Center
- $40 billion: Los Angeles County Metropolitan Transportation Authority
- $255 million: Southern California International Gateway Project
- $350 million: Pasadena Unified School District

San Luis Obispo County

- $356 million: Cal Poly San Luis Obispo
- $52.5 million: Dalido Ranch
- $15.5 million: Juvenile Hall expansion

Solano County

- $34.8 million: Fairfield-Vacaville Train Station Project
- $348 million: Solano Community College District
- $100 million: Solano Fairgrounds Redevelopment

Sonoma County

- $560 million: Pio Pico Energy Center, Wild Horse Geothermal Project, and the Buckeye Geothermal Facility
- $240 million: Santa Rosa Courthouse
- $120 million: North Point Corporate Center
- $250 million: Graton Rancheria parking structures
- $252 million: Sonoma State
- $120 million: Westside District Mixed Use Development

Ventura County

- $194 million: California State Channel Islands
- $37 million: Las Posas desalting bracking groundwater
- $500 million: Sakioka Farms Business Park
- $60 million: Multi-modal Transportation Center

Additionally, statewide, the Governor's Bay Delta Conservation Plan (BDCP), designed to ensure a reliable supply of water during periods of drought, is generating demand for high-skilled construction workers. This project is expected to create more than 155,000 full-time jobs in California.

Apprenticeship Program

The Panel is authorized to fund Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). The Panel adopted the Apprenticeship Training Program as a pilot in March 2012. It is designed to supplement cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training.

Apprenticeships are a multi-year training program that results in DAS certification. They are authorized in California under the Shelly-Maloney Apprenticeship Labor Standards Act of 1939. Apprentices commit to training under contract with an apprenticeship program sponsor. They advance through a series of apprenticeship levels as they complete modules of RSI and on-the-job training. Wages are paid for hours worked on the job, in progression with a series of advancements up to the Journeyman level.

Apprentice programs are typically sponsored by a Joint Apprenticeship Training Committee (JATC). A JATC is created through collective bargaining, with an equal number of members appointed by union and management with employer contributions to a training trust fund.

Depending on the type of trade, apprenticeship programs vary in length, as shown in the outline on pages 3-4 of this proposal. They also vary in size, ranging from less than 10 to several hundred apprentices at any given point in time. Several types of trainees are eligible under the Apprenticeship Program: Apprentices (second-year), Journeymen and Pre-Apprentices. First-year Apprentices are not eligible due to the higher drop-out rates.

ETP funding flows through a Multiple Employer Contract (MEC). In this proposal, it will be held by a trade association which serves as an umbrella for multiple JATCs. The employers are not "participants" but are signatories to the various Collective Bargaining Agreements.

RSI is traditionally delivered as class/lab, and ETP does not reimburse CBT delivery for apprenticeship training. The curriculum is developed with input from DAS and a designated Local Educational Agency (LEA) which varies by JATC. Again, the affiliated LEAs are outlined on pages 3-4. The Apprenticeship Program allows reimbursement for up to 200 hours of RSI plus OSHA10, per-apprentice.

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.

Because ETP funding cannot displace another source of government funds, the fixed fee rate is reduced by $5.00 to account for adult education funding appropriated each year for Apprentice training through the California Community College Chancellor's Office and Department of Education. This changes the ETP Priority Industry Rate from $18.00 to $13.00 per hour for all Apprentice Job Numbers.

In addition, the Panel adopted a "blended rate" for Journeymen, reflecting the fact that they may be employed by a variety of contractors over the two-year term of an ETP Agreement ranging from large employers to small (≤100 employees). This blended rate is $22 per hour, midway between the Priority Industry standard rate ($18) and Small Business rate ($26).

Under the Apprenticeship Training Program, the post-retention wage has been standardized to $20.55 per hour reflecting the Special Employment Training (SET) wage for Priority Industry. This wage was chosen for ease of administration, recognizing that most Apprentices and all Journeymen exceed the highest ETP wage requirements. However, the actual wages paid are shown in the Training Plan table and contract when they exceed $20.55.

PROJECT DETAILS

All training outlined in this proposal will be center-based and delivered by JATC instructors who are experienced journeymen. Training will take place at various participating JATC training centers.

Commercial Skills for Journeyman and Apprentices

Training is customized for each trade and will focus on how to install and maintain new kinds of equipment, work with new materials, and comply with complex and rapidly changing energy efficiency standards. Commercial skills training will provide trainees with skills to retrofit current buildings to meet LEED certifications, build secure exterior and interior building components, design virtual buildings, and adjust computerized control systems. Training will cover energy-efficient technologies and products such as green building materials, solar photovoltaic panels,

wind turbine systems, new motor controls, advanced welding skills including Tungsten Inert Gas, Metal Inert Gas and/or Stick Welding, climate energy efficiency and consumption greenhouse gas abatement, solar hot water and water efficiency installation and retrofitting, wastewater treatment systems, green materials testing and audit equipment. This training will help workers hone the skills and knowledge necessary to work in green construction.

All apprenticeship training will reflect the RSI coursework for each specific trade.

Computer Skills - Training for journeymen will include 3-D modeling and other virtual applications used in construction; scheduling and planning software; and AutoCAD applications. Trainees will receive skills to modify blueprints; look up project requirements, build budgets and timelines; design virtual buildings; and adjust computerized control systems.

Business Skills - Training will allow journeymen to coordinate and work in project teams which are becoming more common in large construction and public works projects. Trainees will gain tools to plan, organize and manage projects so that they can complete them efficiently and on time. Training may also include customer service, team-building, problem-solving, decision-making and conflict management skills.

OSHA 10/30 Skills: Training is a series of courses "bundled" by industry sector and occupation. Typically, it is delivered to workers in the building trades. Under this proposal, OSHA 10 will be funded for Apprentices and OSHA 10/30 will be funded for Journeymen. 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. Completion of the training results in a certificate that expands employment opportunities. To ensure that each trainee receives certification, ETP will only consider payment earned upon completion of the full 10-hour or 30-hour course. OSHA 10/30 is not included in the 10% limitation on safety training.

Percentage of Training by Type of Training

Journeyman:

- Commercial Skills: 80%
- OSHA 10/30: 10%
- Computer Skills: 5%
- Business Skills: 5%

Apprentice:

- Commercial Skills: 93%
- OSHA 10: 7%

Curriculum Development

All of the participating JATC's are formed pursuant to a collective bargaining agreement and are administered by trustees designated by the participating employers and union locals. Thus, employer representatives who comprise the joint labor-management committees oversee curriculum, the number of trainees, training methods and the day-to-day improvements required for a training program. Examples of data considered when planning course content include:

1) Requirements to meet local construction planning/trends
2) New requirements for emerging green technologies and practices
3) Input from national labor-management apprenticeship committees
4) Hiring needs and feedback reported by local union halls and labor representatives

Marketing and Support Costs

SBCTC is requesting 8% in support costs to fund marketing to employers, recruitment of journeymen and apprentices; and to conduct ongoing assessments of employer-specific job requirements. SBCTC will work with the five participating JATCs to ensure that training meets employer and trainee needs throughout the term of the contract. SBCTC staff will promote the training program at its Building Trades Council meetings, statewide WIB meetings, and labor-industry meetings. In addition, email and face-to-face marketing to employers, contractors associations, and local unions will be ongoing.

SBCTC reports that it has produced award-winning videos about apprenticeship training, green construction and general training programs that JATCs can show to their employers, union representatives, and current and potential construction workers. For journeyman training programs, individual JATCs will advertise through direct mailings, informational flyers, personal contacts, telephone calls, public service announcements, emails, and websites. Staff recommends the 8% support costs.

Commitment to Training

Employers will continue to make contributions to the participating JATC training trusts 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.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET13-0906	Statewide	10/01/12–09/30/14	$689,246	$574,872 (83%)

DEVELOPMENT SERVICES

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

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

Each participating JATC will be reimbursed for training costs based on ETP funds earned for the number of trainees, class/lab hours, and employment retention completed by individual trainees.

Exhibit B: Menu Curriculum

Class/Lab Hours
8-200 Job Number 1
8-210 Job Numbers 2-6

Trainees may receive any of the following:

JOURNEYMAN

COMMERCIAL SKILLS

Electricians:

Solar Panel Installation
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 (AC/DC) Principles
- Math for Electricians
- Ohm's Law
- Generators
- Inductance/Reactance
- Series/Parallel Circuits

Grounding
- Grounding and Bounding
- 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 (PLC)
- 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
- Confined Space Entry
- Specialized Tools
- Conduit Bending
- Rigging
- Firestop Installation
- Blueprints and Schematics
- Work Flow and Resources
- Advanced Lighting Controls

Sheet Metal Workers:

- HERS (California Home Energy Rating System Program)
- Energy Auditing: Total Building (Green Training)
- Energy Auditing: Total Heating Ventilation and Air Conditioning (HVAC) Systems (Green Training)
- Ducts Maintenance
- Working with Building Materials
- Upgrading Lead Handling and Asbestos Removal Skills
- Proper Machine and Equipment Set-Up
- Advanced Welding Skills
- Architecture Designs
- Management and Monitoring of Materials

- Testing Materials and Equipment–Proper Set-Up and Use
- Materials and Equipment Testing for Industrial Use
- Understanding Changes to Industry Standards
- Safe Working Practices
- Rigging and Signal
- Lean Construction
- Construction Job Coordination
- Fire/Life HVAC System Building Inspection Training
- California Green Building Code Training

All Trades:

- Energy Audits
- Welding and Burning
- Proper Installation, Use of Testing and Auditing Materials and Equipment (Green Training)
- Understanding New Technologies and Changes to Industry Standards (Green Training)
- Proper Equipment Set-Up (Green Training)
- Safe Working Practices
- Advanced Instrumentation and Motor Controls
- Programmable Logic Controllers
- Advanced Welding
- Architecture Designs and Advanced Plan Reading
- Management and Monitoring of Materials
- Testing Materials and Equipment–Proper Set-Up and Use (Green Training)
- Understanding Changes to Industry Standards (Green Training)

OSHA 10/30 (OSHA CERTIFIED INSTRUCTOR)

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

COMPUTER SKILLS

- Auto Computer-Aided Design (AutoCAD)
- Scheduling and Planning Jobs
- Automated Systems Applications Scheduling & Planning
- 3-D Modeling - Virtual Construction
- Benchmark Software – Lean Construction

BUSINESS SKILLS

- Teambuilding Skills
- Green Awareness Training and Green Certifications
- Leadership Skills
- Customer Service Skills
- Conflict Resolution
- Problem Solving
- Decision Making Skills

- Inventory Checklist
- Creating Master Plan for Future Improvements
- Advanced Time Management
- Filling Out Work Documents and Reports Accurately
- Project Management
- Creating Project Bids

Class/Lab Hours
8-210 Job Numbers 2-6

APPRENTICE

COMMERCIAL SKILLS

Electricians:

- AC Refrigeration
- AC Theory
- Blueprints
- Building Automation and Controls
- Codeology: Code and Practices
- Conduits
- Control Diagrams and Drawings
- Circuits
- Digital Electronics, DC Theory and DC/AC Theory
- Distributed Generation
- Electrical Theory and Electrical Code
- Electrical Grounding
- Electrical Motors
- Electrical Safe Work Practices
- Electric Vehicle Infrastructure
- Estimating
- Fire Alarm Systems
- Generators and Transformer Theory
- Grounding and Bonding
- Hazardous Location
- Health Care Systems
- Industrial Blueprints
- Installer/Technician
- Closed Circuit Television
- Local Area Network
- Nurse Call System
- Paging System
- Radio Frequency Communications
- Sound Reinforcement
- Telephony
- Instrumentation
- Lighting Essentials and Protection
- Low Voltage Systems and High Voltage Systems
- Materials, Tools and Wire Methods
- Mechanical and Electric Benders

- Mathematics
- Motor Control
- National Electrical Code
- National Electric Code Grounding
- Over-Current Protection
- Photovoltaic Systems
- Pipe Bending
- Power Quality
- Programmable Logic Controllers
- Rigging
- Security System
- Semiconductor Electronics
- Structured Cabling
- System Sec/Solar or Theory CD/B
- Test Instruments and Applications Manual
- Torque
- Transformers and Transformer Connections
- Arc Flash Protection
- Energy Efficiency
- Fiber Optics
- Lightning Protection
- First Aid/ CPR

Sheet Metal Workers:

Building Trades Service
- Basic Electricity for Sheet Metal Air Conditioning Service
- Advanced Electricity for Sheet Metal Air Conditioning Service
- Air Conditioning, Commercial Systems, Heating
- Commercial Systems, Heat Loads, Piping
- Refrigeration for Sheet Metal Air Conditioning Service
- Properties of Air Distribution for Sheet Metal Air Conditioning Service
- Refrigeration Theory for Sheet Metal Air Conditioning Service
- Sheet Metal Control Systems

Energy Management Test and Balance
- Air Balance Test Equipment Instruments
- Temperature Measurement Instruments & Duct Systems
- Electrical Systems Operation, Controls & Devices
- HVAC Testing & Balancing Procedures
- Air Distribution & Manufacturing Systems
- Systems Installation & Troubleshooting
- Control Systems
- Hazardous Material Recognition for the Test & Air Balance Industry

Building Trades Sheet Metal
- Parallel Line Fittings
- Triangulation Fittings
- Radial Line Layout and Ogee Offsets

- Basics of Architectural Sheet Metal
- Architectural Sheet Metal
- Field Installation
- Welding I: Process and Safety Overview, GMAW
- Welding II: GMAW & FCAW
- HVAC Energy Conservation
- Plans and Specifications
- Submittals and Shop Drawings
- Industrial and Stainless Steel Introduction
- HVAC Air Systems and Duct Design
- Measuring and Sketching
- Fabrication and Shortcuts
- Codes and Standards
- Metal Roofing
- Advanced Welding
- CAD Detailing
- Intermediate CAD
- Advanced Architectural
- Advanced Layout and Fabrication
- Project Management, Takeoffs, Estimates
- Service Basics for Sheet Metal Workers
- Final HVAC Project
- Final Architectural/Industrial Project

Residential HVAC

- Residential Structure and Sheet Metal Work
- Residential Duct Systems
- Residential AC Units
- Piping
- Filters and Filter Housings
- Common Furnace Features
- Furnace Installation
- Installing Thermostats, Flues and Vents

Bricklayers and Allied Craftworkers:

<u>Marble Finisher</u>

- Slurrying & Roughing-in Large Floors
- Grouting with a Grout Bag
- Holding String Lines and Chalk Lines
- Cleaning, Polishing and Sealing
- Waterproofing
- Caulking
- Bull Nosing
- Grouting with Epoxy
- Shower Pans
- Lath & Scratch
- Types of Tile

- Square Footages & Room Setup
- Trim Shapes
- Polishing
- Detail cut & Color Theory
- Repair & Restoration
- Drilling & Anchoring
- Edge Detail
- Use of Tools-Hand & Power
- Material Handling
- Cutting & Grinding
- Fabrication
- Squaring & Straightening
- First Aid/ CPR

Terrazzo Worker

- Blueprint Reading
- Epoxy fill & Repair
- Epoxy Resin & Catalyst
- Filling & Grouting Cement Terrazzo Walls & Floors
- Float Walls for Terrazzo Installation
- General Layout
- Grinding Cement Terrazzo Walls & Base Wet & Dry
- Grinding Epoxy Terrazzo Floors and Walls
- Identification of Sizes & Types of Chips and Strips
- Installation of Strips in Cement Terrazzo and Epoxy Terrazzo
- Journeyman Project
- Lath & Scratch
- Maintenance of Floor & Base Grinder
- Materials/Products and Procedures
- Mixing of Chips for Cement and Epoxy Installation
- NTMA Specifications
- Palladiana
- Polishing & Sealing Cement and Epoxy Terrazzo
- Preparation of Wood Sub floors
- Quality Control
- Skills/Techniques/Procedures
- Slurrying & Roughing in Floors
- Special Epoxy Design
- Square Footages & Material Setup
- Steps- Dry Pack Installation
- Steps- Orientation
- Steps-Cement Terrazzo Installation
- Steps-Epoxy Terrazzo Installation
- Venetian Design Work
- Water Level, Transit and Laser
- First Aid/ CPR

Tile Finisher and Setter

- Blueprint Reading
- Bull Nosing
- Caulking
- Cleaning, Polishing and Sealing
- Commercial Room Layout #1 and #2
- Wet & Dry Grinding Cement Terrazzo Floors, Walls &Base
- Float and Tile a Shower Floor, Cased Window, Ceiling, Circular Column, Dome, Gothic Arch, Semi-Circular Arch, Serpentine Wall, Radius Stairs, Straight Stairs, Straight Kitchen and Backsplash, Tub Splash, Tub/Shower Combination, Elliptical Arch, Buttress Walls and Jamb, Nitch, Oval Bowl Pullman (HORSETOOTH), Radius Countertop and “L” and “U” Shaped Kitchen
- Float Large Walls – Using String lines to Set Strips
- Grouting with a Grout Bag and Epoxy
- Holding String Lines and Chalk Lines
- Laser and Transit Use
- Lath & Scratch
- Set screeds on Large Floor and Float
- Shower Pans
- Slurrying & Roughing-in Large Floors
- Square Footages & Room Setup
- Square Shower Walls and Curb
- String lines and Screeds for Slope
- Technical Aspects of Tile Installations
- Trim Shapes
- Types of Tile
- Use of a Tile Rack
- Water level Rooms for Wall Layout and Floor Elevations
- Waterproofing
- First Aid/ CPR

Bricklayer

- Blueprint Reading
- Building Arches
- Building Codes
- Building Radius Walls
- Construction Sequence
- Cutting and Welding Steel
- Drawing and Sketching Techniques
- Green Construction, Design, Materials, Methods and Techniques, LEED Certification
- Hand Tool and Equipment, Proper Use and Safety
- History of Masonry
- Insulated Concrete Forms
- Interlocking Paving
- Laying Corner Leads

- Laying Headers, Soldiers, and Roloks
- Laying Piers
- Laying Pilasters
- Laying to the Line
- Lintel Beam Construction
- Materials, Identification, Characteristics, and Estimating
- Metrics
- Mixing Mortar
- Pattern Bonds
- Paving
- Proto II Walls
- Read a Rule
- Rebar Identification and Installation
- Scaffold Safety Training
- Segmental Retaining Walls
- Trade Math
- Transit Familiarization
- Waterproofing
- First Aid/ CPR

<u>Marble Finisher</u>

- Basic Bricklaying Fundamentals
- Blueprint Reading
- Building Codes
- Caulking
- Cleaning and Polishing Marble
- Cleaning Masonry
- Construction Sequence
- Cutting and Welding Steel
- Deck Coatings
- Drawing and Sketching Techniques
- Drilling and Cutting Marble to Specific Dimensions
- Epoxy Injection
- Fundamentals of Marble Setting
- Green Construction, Design, Materials, Methods and Techniques, LEED Certification
- Grouting and Caulking Slabs
- Hand Tool and Equipment
- Hand-Set Techniques
- Laying and Cutting Building Units
- Laying and Setting on Footings and Foundations
- Materials, Identification, Characteristics, and Estimating
- Mechanical Anchoring
- Metrics
- Mixing Mortar and Epoxy
- Move and Store, Rig and Hoist Materials
- Patching Marble and Related Materials

- Pinning
- Pointing, Caulking, and cleaning
- Prepare Marble for Setting, Including Anchoring and Plugging
- Rigging
- Scaffold Erection and Safety Training
- Substructure Preparation
- Trade Math
- Tuckpointing
- Waterproofing
- First Aid/ CPR

OSHA 10 (OSHA CERTIFIED INSTRUCTOR)

- OSHA 10 (requires completion of 10 hours)

Note: Reimbursement for Job Number 1 Journeymen retraining is capped at 200 total training hours per trainee regardless of the method of training delivery. Reimbursement for Job Numbers 2-6 Apprenticeship training is capped at 200 total training hours per trainee in Commercial Skills and 10 hours of OSHA10 for a total of 210 hours regardless of the method of training delivery. 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.

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

The Corporation for Manfacturing Excellence

Agreement Number: ET16-0147

Panel Meeting of: August 28, 2015

ETP Regional Office: San Francisco Bay Area **Analyst:** A. Nastari

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee SB <100 HUA	Industry Sector(s):	Manufacturing Priority Industry: ☒ Yes ☐ No
Counties Served:	Statewide	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☐ Yes ☒ No		
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		≤20%	

FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
$888,568		$61,344 8%		$949,912

In-Kind Contribution:	50% of Total ETP Funding Required	$937,200

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, Mgmnt. Skills, Literacy Skills	311	8 - 200	0	$981	$15.07
				Weighted Avg: 51			
2	Retrainee Priority Rate SB<100	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, Mgmnt. Skills, Literacy Skills	389	8 - 200	0	$1,529	$15.07
				Weighted Avg: 55			
3	Retrainee Priority Rate HUA	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, Mgmnt. Skills, Literacy Skills	40	8 - 200	0	$1,251	$11.30
				Weighted Avg: 65			

Minimum Wage by County: Job Numbers 1 and 2: $16.44 per hour in Alameda, Contra Costa, Marin, San Francisco, San Mateo, Santa Clara, and Santa Cruz Counties; $15.97 per hour in Los Angeles County; $16.02 per hour in Orange County; $15.75 per hour in Sacramento County; $15.93 per hour in San Diego County; $15.07 all other counties.

Job Number 3 (HUA): $11.30 per hour in San Bernardino.

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

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Engineering Staff 1		20
Engineering Staff 2		10
Front Office Staff		20
Managers		15
Production/Quality Staff		201
Supervisors		20
Support Staff		25

Job Number 2		
Engineering Staff 1		20
Front Office Staff		20
Managers		14
Production/Quality Staff		290
Supervisors		20
Support Staff		25
Job Number 3		
Engineering Staff 1		5
Front Office Staff		3
Managers		2
Production/Quality Staff		20
Supervisors		5
Support Staff		5

INTRODUCTION

The Corporation for Manufacturing Excellence (Manex) (www.Manexconsulting.com) founded in 1995, and headquartered in San Ramon, provides business improvement services to manufacturers. These services include corporate strategy, strategic planning, and marketing development of Lean manufacturing, supply chain and logistics. It also assists clients with staff development in Six Sigma principals, ISO processes, performance management and systems implementation including ERP readiness, Change Management and Program Management. Manex is a partner with the National Institute of Standards and Technology, Manufacturing Extension Partnership, whose goal is to work with small to mid-size companies by providing business assistance and training with the goal of retaining businesses and jobs in California.

This will be Manex's thirteenth Agreement with ETP, in which it will continue to provide business services and training to manufacturers. During Manex's previous ETP Agreements, it served California manufactures of aircraft parts, machine shops, recycled rubber manufacturers, food manufacturers and processors, high tech medical device manufacturers, printers and flow meters. Training was delivered to production workers, customer service representatives and supervisors. Courses consisted of continuous improvement activities, quality control, ISO certification, basic manufacturing, lean manufacturing, basic computer skills, facility layout, Kaizen, Kanban, management and leadership skills, systems implementation Enterprise Resource Planning, Customer Response Management Warehouse Management Systems selection and implementation, financial management, sales and marketing, market segmentation and development of marketing material.

PROJECT DETAILS

Manex's new Proposal will be similar to its prior projects. However, Manex is expanding offerings to a broader range of industries that are ETP Priority Industries. Those industries may include Biotechnology and Life Sciences, Information Technology, Technical Services, and Transportation Logistics. The majority of the training will be conducted at participating employers' facilities.

Manex serves the Monterrey area, north to the Oregon border, and east to Nevada, with 80% of the manufacturers located in the San Francisco Bay Area. Some of the cities located in HUA,

may also participate in the training. Although Manex also serves larger businesses, in its 2014/2015 Agreement, 68% of its participating employers were small businesses with less than 100 employees.

Training Plan

Training for participating employers will improve processes by reducing waste; increasing profitability; allowing the companies to acquire new customers and enter new industries and markets.

Manex will customize each participating employers training plan consisting of the following:

Business Skills (10%) - Training will be offered to all occupations to give trainees the skills needed to provide quality customer service to internal and external customers.

Continuous Improvement (60%) - Training will be offered to all occupations in an effort to enhance problem solving and decision making skills which increase efficiency and lower operating costs.

Computer Skills (2%) - Training for all occupations will improve skills in software systems, computer aided design software programs, enterprise manufacturing management, database applications, and website development and maintenance.

Literacy Skills (3%) - Training will be offered to trainees that need basic skills to perform their jobs or to fully participating in the training programs. The training will improve employee teamwork, communication, and productivity.

Management Skills (10%) - Training will offer to Managers and Supervisors to improve communication and provide leadership in their respective department. With improved the use of strategic planning the trainees will be able to become effective leaders.

Manufacturing Skills (15%) - Training will be for Managers, Supervisors, Production/Quality, and Engineering Staff. Training in Lean manufacturing, equipment maintenance, manufacturing techniques, and cross training will ensure that production processes are streamlined which will result in timely delivery, cost savings, reduction in waste and rework.

High Unemployment Area

Trainees in Job Number 3 work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%. Manex will train one participating employer located in Victorville, San Bernardino County. Manex will send its trainers to the participating employer's facility. The Company's location in San Bernardino County, qualifies for HUA status under these standards.

- Wage Modification

For these trainees, the Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. Manex requests a wage modification for trainees in Job 3 to $11.30.

Marketing and Support Costs

Manex is actively involved with various community organizations, such as economic development partners, cities, chambers of commerce, colleges, and business groups. Manex staff also sponsors seminars and conferences throughout Northern California promoting changes and advancements in training opportunities for manufacturers.

Manex requests and staff recommends an 8% support cost for help with recruitment and marketing efforts required to secure participating employers statewide.

Commitment to Training

Participating employers' internal training programs consist of job-specific skills organization-wide training related to initial on-boarding, orientation, company policies, basic manufacturing skills specific to their operations, machine specific training, process training, general health and safety training. The ETP fund training will improve operational performance and support increased manufacturing competitiveness.

Manex 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

  Manex's Director of Client Services conducts needs assessments at client facilities. Once approved, Manex's dedicated ETP Administrator is responsible for ensuring a participating employer meets ETP's guidelines, enrolls and enters data into the ETP online systems, reviews rosters for completeness, conducts invoicing processes and reviews plan updates. Every Manex trainer will be responsible for collecting rosters for training delivered and provide the rosters to Manex's ETP project administrator.

Trainer Qualifications

The majority of training will be provided directly by Manex employees. All Manex employees have experience with the broad categories of Continuous Improvement, Lean Manufacturing, Quality Control and Six Sigma, business strategy, and sales and marketing development. Manex employees also have a wide range of certifications including Certified Quality Engineer, Project Management Professional, and Six Sigma Master Black Belt. Training will only be delivered by outside vendors if an employer requires specific training that Manex does not have the internal expertise to deliver, examples of this may include Advanced Technology training and training on specific machining software.

Impact/Outcome

Manex assists manufacturers prepare for certification programs such as ISO Certification, Quality Standards, and Safe Quality Food certifications of completion. These certifications and/or product diversification often lead to new markets and increased sales, which help companies grow and provide workforce stability.

Tuition Reimbursement

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

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET14-0274	$656,731	2/3/14 – 2/2/16	370	43	43

Based on ETP Systems, 19,918 reimbursable hours have been tracked for potential earnings of $461,346 (70% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to by employers and in progress through February 2, 2016.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET12-0364	Statewide	4/30/12 – 4/29/14	$749,192	$537,037 (72%)
ET11-0239	Statewide	5/9/11 – 5/8/13	$396,308	$394,812 (99%)

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

8 - 200 Trainees may receive any of the following:

BUSINESS SKILLS

- Budget Analysis
- Business Plans
- Business Strategies
- Communication Skills
- Computer/Internet Applications in Business
- Change Management
- Customer Service
- Developing Sales Strategies
- Developing Marketing Strategies
- ERP/MRP Readiness
- ERP/MRP System Implementation
- Export Tech
- Inventory Control
- Listening Skills
- Materials Management
- Marketing for Small/Medium-Sized Mfgs:
  - Evaluating Marketing Effectiveness
  - Marketing Concepts
  - Marketing Techniques
  - Practical Marketing Applications
- Multi-Cultural Awareness
- Negotiating Skills
- New Product Introduction
- Project Management Techniques
- Relationship Building for Small/Medium-Sized Mfg
- Business Administration for Small/Medium-Sized Mfg
- Selling/Serving the Customer
- Strategic Planning
- Strategic Sourcing
- Total Cost of Ownership
- Sustainability
- Technical Writing

COMPUTER SKILLS

- Accounting Systems
- CAD/CAM/CAE
- CNC
- Communications Systems
- Database Management
- Desktop Publishing
- Digital Entertainment Systems
- Graphics
- ERP/MRP Systems
- Internet
- Payroll Systems

- Presentation
- Programming
- Publishing
- Spreadsheets
- Technical Writing
- Telecommuting
- Website Development and Maintenance
- Word Processing

CONTINUOUS IMPROVEMENT

- Assessment Principles
- Audit Principles
- American Institute of Baking (Quality Standards)
- Basic Quality Tools
- Benchmarking Principles
- Building Teams
- Business Improvement Principles
- Good Manufacturing Practices (cGMP)
- Communication Skills
- Continuous Improvement Skills
- Creative/Innovative Thinking Skills
- Creative Problem Solving Skills
- Cycle-Time Reduction Techniques
- Cycle-Time Management Techniques
- Decision Making Skills
- Defining Problems
- Design for Manufacturing Acceptability
- Design of Experiments
- Developing Action Plans
- Developing Solutions
- Effective Meetings
- Effective Teams
- Effective Writing
- Empowerment Processes
- Hazardous Assessment Critical Control Point/Food Safety
- Implementation Skills
- Interpersonal skills
- Interpreting & Analyzing Data
- ISO
- Just-in-Time Production (JIT):
  - Cycle-Time Reduction
  - Cycle-Time Management
  - Developing JIT
  - Evaluating JIT
  - Implementing JIT
  - Organizing for JIT
  - JIT Principles
  - JIT Production
- Lean Manufacturing
- Leadership Skills
- Manufacturing Excellence

- Monitoring The Process
- Presentations
- Process Control Principles
- Process Capabilities
- Process Improvement
- Process/Product Handling
- Production Scheduling
- Production Operations/Workflow
- Root Cause Analysis
- Self-Directed Work Teams
- Situation/Problem Analysis
- <u>Statistical Process Control (SPC):</u>
  - Data Collection
  - Design for Manufacturing Acceptability
  - Design of Experiments
  - Developing SPC
  - Documenting Processes
  - Evaluating SPC
  - Failure Mode Effects Analysis
  - Five S Principles
  - Graphing
  - Implementing SPC
  - Kaizen Principles
  - Kanban Principles
  - Key Process Indicators
  - Lean Manufacturing Principles
  - Organizing for SPC
  - Root Cause Analysis
  - SPC Concepts, Theory & Application
  - SPC Tools
  - Six Sigma
  - Statistical Techniques
  - Taguchi Methods
  - Variation/Process Control
  - Validation
- System Analysis
- System Strategies
- Taguchi Methods
- <u>Team Building/Problem Solving:</u>
  - Building Teams
  - Communication
  - Creative/Innovative Thinking
  - Decision Making
  - Developing Action Plans
  - Developing Solutions
  - Effective Teams
  - Empowerment Process
  - High Performance Work Teams
  - Leadership
  - Multicultural Communication/Diversity
  - Problem Solving
  - Self-Directed Work Teams

  - Situation/Problem Solving
  - Team Concepts
  - Team Building/Problem Solving
  - Teamwork in an Empowered Workforce
- Total Quality Management (TQM):
  - Audit Planning
  - Basic Quality Tools
  - Benchmarking
  - Business Process Improvement Change Process
  - Continuous Improvement
  - Creative Problem Solving/Innovation
  - Creative/Innovative Thinking
  - Developing TQM
  - Evaluating TQM
  - Implementing TQM
  - Organizing for TQM
  - Quality Concepts
  - TQM Strategies
- Train-the-Trainer
- Value Stream Mapping
- Variation/Process Control

MANAGEMENT SKILLS (Managers/Supervisors Only)

- Coaching/Feedback
- Communication Skills
- Conflict Management
- Decision Making/Problem Solving
- Developing Teams
- Effective Meetings
- Effective Writing
- Facilitation Skills
- Finance for Small/Medium-Sized Mfgs
- Leadership/Management Development
- Managing Change
- Managing Customer Service (Internal & External)
- Managing Innovation
- Manufacturing Cells
- Marketing for Small/Medium-Sized Mfgs
- Motivation/Reinforcement
- Performance Management
- Project Management
- Strategic Planning

MANUFACTURING SKILLS

- Air Filtration/Clean Room
- Assembly Operations
- Assembly & Surface Mount
- Automated Equipment
- Bagging Machines
- Bio-Science Manufacturing
- Blueprint Reading

- <u>Clean and Green Technology:</u>
  - Introduction of Green Manufacturing Practices
  - Manufacturing of Green Technologies and Products
  - Solar, Wind, Alternative Energy
- Computer-Aided Design
- Computer-Aided Engineering
- Computer-Aided Manufacturing
- Computer Numeric Control
- Cellular Manufacturing
- Chemistry
- Computer Electronics
- Cycle-Time Reduction
- Cutting
- Electro Static Discharge
- Electronics
- Electronic Assembly Workmanship
- Equipment Operations
- Equipment/Preventive Maintenance
- Enterprise Resource Planning
- Facilities Management
- Fabric/Garment Manufacturing Skills
- Food Processing
- Five S Principles
- Good Manufacturing Practices (GMP)
- Hazard Assessment Critical Control Point
- Handling Changes
- Inventory Control
- International Standards Organization Certification
- Kaizen Principles
- Kanban Principles
- Layout
- Lean Manufacturing Principles
- Machining
- Machine Trades
- Maintenance Mechanic Overview Level 1
- Maintenance Mechanic Overview Level 2
- Machine Tool Technology
- Introduction to Hand Tools
- Manufacturing Processes
- Meeting Customer Expectations (Internal/External)
- Metrology/Geometric Dimensioning & Tolerances
- Mounts
- Manufacturing Resource Planning
- Optimal Operating Methods
- Physics
- Pneumatics/Hydraulics
- Presses
- Pressing
- Production Techniques
- Programmable Logic Controllers
- Quality

- Re-Engineering Concepts
- Refrigeration/Heating
- Root Cause Analysis
- Sequencing Sewing Operations
- Set-Up Reduction
- Sew Engineering/Setting Piece Rates
- Sew Trainer
- Shipping/Receiving
- Shop Skills -- Drawing, Measurement and Instrumentation
- Soldering Skills
- Special Machines/Inspections
- Statistics Skills for Operations
- Surface Mount Technology
- Technical Training
- Total Productive Manufacturing
- Total Quality Management
- Training Within Industry
- Understanding Product Specs/Drawings
- Value Stream Mapping
- Warehousing Operations/Distribution
- Welding
- Work Measurement
- Workflow
- World Class Manufacturing Principles

LITERACY SKILLS (Cannot exceed 45% of total training hours)

VESL:

- Comprehension Skills:
  - Communicating Common Work-Related Instructions
  - Equipment Operation Language
  - Job Related Vocabulary & Phrases
  - Multi-Cultural Communication
  - Shop Floor Language
  - SPC Language
  - Understanding Common Work-related Instructions
  - Understanding Schematics Used On-The-Job
- Oral Skills:
  - Basic Grammatical Structure
  - Presentation Skills
  - Pronunciation
  - Vocational Vocabulary and Phrases
- Basic Writing Skills
- Completing Job-related Forms
- Computer Skills
- Reading Comprehension
- Basic Math:
  - Applying Math to Job Functions
  - Fundamentals of Mathematics

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

Participating Employers in Retrainee
Multiple Employer Contracts

Contractor's Name: Manex | CCG No.: ET16-0147

Reference No: 15-0034 |

PRINT OR TYPE

Company: A1Jays Machining Inc.

Address: 2228 Oakland Rd.

City, State, Zip: San Jose, CA 95131

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 75

Total # of full-time company employees in California: 75

Company: Advanced Machining Techniques, Inc.

Address: 16205 Vineyard Blvd.

City, State, Zip: Morgan Hill, CA 85037

Collective Bargaining Agreement(s): No

Estimated #of employees to be retrained or hired under this Agreement: 15

Total # of full-time company employees worldwide: 40

Total # of full-time company employees in California: 40

Company: All Fab Precision Sheet Metal

Address: 1015 Timothy Drive

City, State, Zip: San Jose, CA 95133

Collective Bargaining Agreement(s): No

Estimated #of employees to be retrained or hired under this Agreement: 40

Total # of full-time company employees worldwide: 110

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

Company: Alter G

Address: 49438 Milmont Dr.

City, State, Zip: Fremont, CA 94538

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 45

Total # of full-time company employees in California: 45

Participating Employers in Retrainee
Multiple Employer Contracts

Company: Barbosa Cabinets Inc.

Address: 2020 E. Grant Line Rd.

City, State, Zip: Tracy, CA 95304

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 378

Total # of full-time company employees in California: 378

Company: Bay Associates

Address: 150 Jefferson Drive

City, State, Zip: Menlo Park, CA 94025

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained or hired under this Agreement: 15

Total # of full-time company employees worldwide: 95

Total # of full-time company employees in California: 95

Company: Bonelli Enterprises, Inc.

Address: 333 Corey Way

City, State, Zip: South San Francisco, CA 94080

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained or hired under this Agreement: 15

Total # of full-time company employees worldwide: 35

Total # of full-time company employees in California: 35

Company: CAL-Weld

Address: 4308 Solar Way

City, State, Zip: Fremont, CA 94538

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained or hired under this Agreement: 60

Total # of full-time company employees worldwide: 150

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

Participating Employers in Retrainee
Multiple Employer Contracts

Company: Casa Sanchez Foods

Address: 370 Adrian Rd.

City, State, Zip: Millbrae, CA 94039

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 65

Total # of full-time company employees in California: 65

Company: Cellotape/Landmark Label Inc.

Address:47623 Fremont Blvd.

City, State, Zip: Fremont, CA 94538

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained or hired under this Agreement: 50

Total # of full-time company employees worldwide: 135

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

Company: Corwil Technology, Inc.

Address: 1635 McCarthy Blvd.

City, State, Zip: Milpitas, CA 95035

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 160

Total # of full-time company employees in California: 160

Company: Costeaux French Bakery

Address:417 Healdsburg Ave.

City, State, Zip: Healdsburg, CA 95448

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 65

Total # of full-time company employees in California: 65

Participating Employers in Retrainee
Multiple Employer Contracts

Company: Direct Pack Inc.

Address: 935 Enterprise Way

City, State, Zip: Napa, CA 94558

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 160

Total # of full-time company employees in California: 160

Company: EMG Inc.

Address: PO Box 4394

City, State, Zip: Santa Rosa, CA 95402

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained or hired under this Agreement: 18

Total # of full-time company employees worldwide: 81

Total # of full-time company employees in California: 81

Company: Energy Sales

Address: 1308 Borregas Ave.

City, State, Zip: Sunnyvale, CA 94089

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained or hired under this Agreement: 15

Total # of full-time company employees worldwide: 40

Total # of full-time company employees in California: 40

Company: Flexstar Technology, Inc.

Address: 1965 Concourse Dr.

City, State, Zip: San Jose, CA 95131

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 50

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

Participating Employers in Retrainee
Multiple Employer Contracts

Company: Heath Ceramics

Address: 400 Gate 5 Road

City, State, Zip: Sausalito, CA 94965

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained or hired under this Agreement: 40

Total # of full-time company employees worldwide: 70

Total # of full-time company employees in California: 70

Company: IntegenX, Inc.

Address: 5720 Stoneridge Dr., Suite 300

City, State, Zip: Pleasanton, CA 94588

Collective Bargaining Agreement(s): No

Estimated #of employees to be retrained or hired under this Agreement: 36

Total # of full-time company employees worldwide: 80

Total # of full-time company employees in California: 80

Company: Integrated Optical Services

Address: 3150 Molinaro Street

City, State, Zip: Santa Clara, CA 95054

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 25

Total # of full-time company employees in California: 25

Company: Leading Edge Aviation Services

Address: 5251 California Ave., Suite 170

City, State, Zip: Irvine, CA 92617

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained or hired under this Agreement:40

Total # of full-time company employees worldwide: 400

Total # of full-time company employees in California: 260

Participating Employers in Retrainee
Multiple Employer Contracts

Company: Materion Electrofusion

Address: 44036 S. Grimmer Rd.

City, State, Zip: Fremont, CA 94538

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 200

Total # of full-time company employees in California: 70

Company: Motiv Power Systems Inc.

Address: 1165 Chess Dr., Ste. E

City, State, Zip: Foster City, CA 94404

Collective Bargaining Agreement(s): No

Estimated #of employees to be retrained or hired under this Agreement: 15

Total # of full-time company employees worldwide: 35

Total # of full-time company employees in California: 35

Company: Myers and Sons Highway Safety

Address: 935 Enterprise Way

City, State, Zip: Napa, CA 94558

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 160

Total # of full-time company employees in California: 160

Company: Nutek Corporation of California, Inc.

Address: 1001 Whipple Avenue

City, State, Zip: Hayward, CA 94544-7928

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 40

Total # of full-time company employees in California: 40

Participating Employers in Retrainee
Multiple Employer Contracts

Contractor's Name: Manex | CCG No.: ET16-0147

Reference No: 15-0034 | Page 7 of 7

Company: Package One, Inc.

Address: 4225 Pell Dr.

City, State, Zip: Sacramento, CA 95838

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 70

Total # of full-time company employees in California: 70

Company: Santini Foods, Inc.

Address: 16505 Worthley Ave.

City, State, Zip: San Lorenzo, CA 94580

Collective Bargaining Agreement(s): No

Estimated #of employees to be retrained or hired under this Agreement: 18

Total # of full-time company employees worldwide: 110

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

Company: SolarBos Inc.

Address: 310 Stealth Court

City, State, Zip: Livermore, CA 94551

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 55

Total # of full-time company employees in California: 55

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Carpenters Training Committee for Northern California

Agreement Number: ET16-0907

Panel Meeting of: August 28, 2015

ETP Regional Office: Sacramento **Analyst:** M. Mazzone

PROJECT PROFILE

Contract Attributes:	Apprenticship Veterans Priority Rate	Industry Sector(s):	Construction Priority Industry: ☒ Yes ☐ No
Counties Served:	Northern and Central California	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☒ Yes ☐ No Northern California Carpenters Regional Council		
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		N/A	

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
$882,220		$67,682 8% (20% Veterans)		$949,902

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

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Pre-Apprentice	Commercial Skills, Literacy Skills	118	8-200	0	$3,882	$20.55
				Weighted Avg: 165			
2	Journeyman	Commercial Skills, Continuous Improvement	46	8-200	0	$941	$35.17
				Weighted Avg: 40			
3	Apprentice	Commercial Skills	225	8-200	0	$1,668	$21.10
				Weighted Avg: 120			
4	Veteran Apprentice	Commercial Skills	40	8-200	0	$1,668	$21.10
				Weighted Avg: 120			

Minimum Wage by County: Modified Statewide Average Wage for Priority Industry: $20.55 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 $0.68 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
Pre-Apprentice Carpenter		118
Journeyman Carpenter		46
Apprentice Carpenter		225
Veteran Apprentice Carpenter		40

INTRODUCTION

Carpenters Training Committee for Northern California (CTCNC) is the educational organization that provides Pre-Apprentice, Apprentice, and Journeyman training services for union carpenters across 46 northern and central California counties. CTCNC is governed by a joint labor and management trust board, as agreed to in collective bargaining. Its apprenticeship training programs have been established for many years as approved by the Division of Apprenticeship

Standards, Department of Industrial Relations. CTCNC governs the training trust on behalf of workers represented by the United Brotherhood of Carpenters & Joiners of America. Training will take place at one of CTCNC's five training locations including: Pleasanton, Fairfield, Hayward, Morgan Hill and Fresno.

This is the fifth ETP Agreement between ETP and CTCNC. However, this is the first time Veterans have been included as a discrete cohort of Apprentice trainees.

Apprenticeship Pilot

The Panel is authorized to fund Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). The Panel adopted the Apprenticeship Training Program as a pilot in March 2012. It is designed to supplement cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training.

Apprenticeships are a multi-year training program that results in DAS certification to work as a Journeyman. They are authorized in California under the Shelly-Maloney Apprenticeship Labor Standards Act of 1939. Apprentices commit to training under contract with an apprenticeship program sponsor. They advance through a series of apprenticeship levels as they complete modules of RSI and on-the-job training. Wages are paid for hours worked on the job, in progression with a series of advancements up to the Journeyman level.

Apprentice programs are typically sponsored by a Joint Apprenticeship Training Committee (JATC). A JATC is created through collective bargaining, with an equal number of members appointed by union and management, with employer contributions to a training trust fund.

Depending on the type of trade, apprenticeship programs vary in length, typically from 2-6 years. They also vary in size, ranging from less than 10 to several hundred apprentices at any given point in time. Several types of trainees are eligible under the Apprenticeship Program: Apprentices (second-year), Journeymen and Pre-Apprentices. First-year Apprentices are not eligible due to the higher drop-out rates associated with this entry-level.

ETP funding flows through a Multiple Employer Contract (MEC), in this proposal held by a CTCNC. The employers are not "participants" but are signatories to the Collective Bargaining Agreement.

RSI is traditionally delivered as class/lab, and ETP does not reimburse for training delivered via Computer-based training (CBT) for apprenticeship training. The curriculum is developed with input from DAS and a designated Local Educational Agency; in this proposal the LEA is CTCNC. The Apprenticeship Program allows reimbursement for up to 200 hours of RSI plus OSHA10, per-apprentice. However, CTCNC has not requested OSHA10 training.

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.

Because ETP funding cannot displace another source of government funds, the fixed fee rate is reduced by $5.00 to account for adult education funding appropriated each year for Apprentice training through the California Community College Chancellor's Office and Department of

Education. This changes the ETP Priority Industry Rate from $18.00 to $13.00 per hour for all Apprentice Job Numbers.

In addition, the Panel adopted a "blended rate" for Journeymen, reflecting the fact that they may be employed by a variety of contractors over the two-year term of contract ranging from large employers, to small (≤100 employees). This is $22 per hour, midway between the Priority Industry standard rate ($18) and Small Business rate ($26). [Note: This "blended rate" has been extended to Pre-Apprentices, for ease of administration.]

Under the Apprenticeship Training Program, the post-retention wage has been standardized to $20.55 per hour reflecting the Special Employment Training (SET) wage for Priority Industry. This wage was chosen for ease of administration, recognizing that most Apprentices and all Journeymen exceed the highest ETP wage requirements. However, the actual wage is displayed in the Training Plan Table and the contract if it exceeds $20.55. [Typically, Pre-Apprentices are not yet on payroll; they must satisfy wage and retention requirements after being accepted into the apprenticeship program.]

PROJECT DETAILS

In recent years, the industry has needed assistance in supporting Apprentice training. State funds to support this training have been reduced while the need for training is increasing as the construction industry emerges from the recession.

CTCNC is requesting funds to supplement its training program to meet demand. Its training program has been successful in helping trainees develop into successful Journeymen. Pre-Apprentice training was developed to improve retention rates in the Apprenticeship program and to better serve the signatory employers who hire apprentices. Trainees who successfully complete the Pre-Apprentice program have the basic skills needed to succeed on a construction jobsite. Apprentice training will establish skilled workers who will eventually become Journeymen. All Apprentices participating in ETP training must have advanced to Year 2+.

This Apprenticeship training will include veterans training and will help veterans transition into the civilian workforce. In the last four years, CTCNC has helped 310 veterans enter the carpentry trade. Veterans are recruited directly into first year apprenticeships, bypassing the pre-apprentice requirement for non-veterans.

Training Plan

Pre-Apprentice – Job Number 1

Commercial Skills (80%) - Training will include courses such as Using Lifts, Scaffolding Use, Basic Hand and Power Tools, Material Handling, Framing, Basic Blue Print Reading, Lead and Asbestos Awareness, Foundation Walls, and Concrete Framework.

Literacy Skills (20%) - Training will include Basic Algebraic Equation, Communication Skills, Fractions, Decimals, Positive and Negative Numbers, Math Skills for Construction, and Understanding the Numbering System.

Journeyman – Job Number 2

Commercial Skills (90%) - Training will be offered in advanced skills such as Bridge Building, Advanced Millwright Skills, Green Building, Hardwood Flooring, Lead Abatement, Pile Driving Setup and Operation, Stairs, Roofs, and Welding.

Continuous Improvement (10%) - Training will include Team Skills and Team-Leader Skills.

Apprentice – Job Number 3

Commercial Skills (100%) - Training will be offered in areas of concentration including Carpenter Apprentice, Drywall/Lather Apprentice, Insulator Apprentice, Pile Driver Apprentice, Shingler Apprentice, Acoustical Installer Apprentice, Hardwood Floor Layer Apprentice, Millwright Apprentice, and Scaffold Erector Apprentice.

Commitment to Training
CTCNC has provided training for both Apprentices and Journeyman for over 50 years. The curriculum has evolved to stay current with the work as performed in the field. Some of the classes have developed into a specific process such as Bridge Building Certification or Doors and Hardware.

CTCNC represents that safety training is, and will continue to be, provided by the participating employers in accordance with all pertinent requirements under state and federal law.

Veteran Apprentice – Job Number 4

The training curriculum will be the same as above. These trainees are in a separate Job Number to better track performance for this cohort, toward the goal of improved outreach for the Veterans Pilot overall.

Veterans who apply for CTCNC's apprenticeship program receive direct entry into the program, which includes free training and assistance in finding work with employers throughout the area. In addition, CTCNC works in cooperation with Helmets to Hardhats, a national joint labor-management program (www.ctcnc.org/helmets-to-hardhats). This program helps transition active duty military personnel into employment in the construction industry, including apprenticeship programs.

Impact/Outcome

Trainees will receive certifications specific to their training such as Bridge Building, Concrete Formwork, Fork Lift Operator Safety, Lead Abatement, Rigging, Scaffold User, and Welding.

Marketing and Support Costs

Employers participate as members of CTCNC. They are notified of training through CTCNC's website, mailings, and presentations. Although many of the participating employers have already been recruited, additional recruitment is still needed for more participating employers and trainees and/or to replace employer whose training needs have changed.

CTCNC requests 8% in support costs (20% for Veterans) for marketing, recruitment, and assessment activities. Staff recommends the 8% and 20% in support costs.

Employer Needs Assessment

The training program was created and is governed by a joint labor management committee established through collective bargaining. Industry needs are determined by the committee, which provides feedback on effectiveness; assessment of employer-specific job requirements; employer discussions to ensure that industry trends are being addressed in each training program; feedback from the labor and management team that administers the program; and

evaluations from trainees and program staff.

Trainer Qualifications and Training Coordinator

Trainers are qualified Journeymen with extensive practical and training experience employed by CTCNC. Seven additional CTCNC staff members are responsible for training coordination, including but not limited to marketing, recruitment, needs assessments, scheduling, and ETP administration.

Electronic Record Keeping

CTCNC will use a Learning Management System (LMS) to document and track ETP training. The LMS has been reviewed and approved by ETP staff.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
*ET15-0903	$1,191,507	07/01/14 – 06/30/16	527	1,203	828

*ETP records show that of the 1,203 trainees that have completed training 828 have been placed. ETP Fiscal has determined $678,934 is Earned-Approved and $255,291 is Earned-Pending. To earn 100% of the contract amount a total of 72,531 reimbursable hours are required. The ETP On-Line system indicates that there are 80,520 reimbursable hours uploaded thus far.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET14-0900	Central & Northern California	07/01/13 – 06/30/15	$847,977	$847,977 (100%)
ET12-0175	Central & Northern California	11/21/11 – 11/20/13	723,370	$722,224 (99%)
ET10-0233	Central & Northern California	10/05/09 – 10/04/11	$343,830	$343,830 (100%)

DEVELOPMENT SERVICES

CTCNC retained Steve Duscha Advisories in Sacramento to assist with development of this proposal for a flat fee of $10,000.

ADMINISTRATIVE SERVICES

CTCNC also retained Steve Duscha Advisories to perform administrative services in connection with this proposal for a fee not to exceed 10% of payment earned.

TRAINING VENDORS

N/A

Exhibit B: Menu Curriculum

Class/Lab Hours
Job No. 1: Pre-Apprentice
8-200

Trainees may receive any of the following:

COMMERCIAL SKILLS

- Architect's Scale
- Basic Blueprint Reading
- Basic Hand Tools
- Basic Roof Structures
- Carpenter Terminology
- Compressors
- Concrete Formwork
- Construction Math
- Drywall Framing
- Exterior Finish Applications
- Forklift
- Foundation walls
- Framing
- Green Awareness
- Hazard Communicating
- Job site roles and responsibilities
- Job site systems
- Layout
- Lead and Asbestos Awareness
- Material Handling
- Measurement
- Negotiating with co-workers at the job site
- Orthographic Drawing
- Power Tools
- Safe Working Conditions
- Scaffold Use
- Solar installation
- Using lifts
- Wood and Metal Framing

LITERACY SKILLS

- Basic Algebraic equation
- Communication Skills
- Fractions, decimals, positive and negative numbers
- Math skills for construction
- Understanding the numbering system

Job No. 2: Journeyman
8-200

COMMERCIAL SKILLS

- Acoustical Ceilings
- Advanced millwright skills
- Aerial Lift Safety
- Asbestos Abatement Worker or Supervisor
- Blueprint Reading
- Bridge Building Certification
- Bridge Falsework
- Cleanroom Protocol & Construction
- Commercial Door Hardware
- Commercial Interior Systems
- Commercial Metal Lath (Drywall/Lather)
- Commercial Solar Installation
- Concrete Formwork
- Confined Space Awareness
- Confined Space Entry
- Construction Calculator
- Construction Math & Intro to Working Drawings
- Ergonomics for Carpenters
- Fall Protection
- Firestop Installation
- Fork Lift Operation
- Framing
- Framing Square
- Green Building
- Hardwood Floor Layers/Floor Sanding & Finishing
- Hardwood Flooring
- Hazardous Waste General Site Worker
- Installation of Strip Floors
- Insulation Installation
- Layout Instruments
- Lead Abatement
- Managing safety at the worksite
- Material Safety Data Sheets (MSDS)
- Metrics In Construction
- Pile Driving Setup and Operations
- Rigging
- Roofs
- Safe working conditions
- Scaffolds
- Shaft Liner Construction
- Solid Surface Materials Installation
- Stairs
- Steel Framing
- Superintendent / Leadership Training

- Suspended Ceilings and Soffits
- Welding
- Working Drawings
- Working with gas turbines for millwrights
- Working with pumps for millwrights

CONTINUOUS IMPROVEMENT SKILLS

- Team skills
- Team leader skills

Job No. 3 and 4: Apprentice / Veteran Apprentice
8-200

COMMERCIAL SKILLS

Carpenter Apprentice

- Foundations & Floors
- Blueprint Reading - Basic,
- Wood Framing
- Concrete Formwork
- Exterior Finish
- Blueprint Reading - Advanced
- Concrete Bridge Building
- Interior Finish
- Concrete Structures/Equipment/Safety/Green Technologies
- Rigging
- Layout Instruments
- Engineered Structural Systems
- Commercial Steel Framing
- Commercial Door Hardware
- Stair Building
- Roof Framing
- Introduction to Welding & Cutting

Drywall/Lather Apprentice

- Drywall/Lathing, Trade Safety
- Basic Applications
- Mathematics Review
- Commercial Framing Systems and Fire Stop
- Doors, Frames, Hardware & Windows
- Blueprint Reading I
- Blueprint Reading II
- Applied Blueprint Technology
- Welding (Heavy Plate)
- Welding (Light Gauge)
- Residential Metal Stud Framing
- Exterior Systems & Trims
- Interior Metal Lath Systems
- Shaft Protection & Ceiling Systems
- Arches, Furring & Advanced Systems
- Advanced Construction Techniques

Insulator Apprentice

- Construction Math, Intro to Working Drawings for Insulators, Firestop,
- Residential Blueprint Reading for Insulators, Fork Lift, Driver Safety Training
- Residential Insulation Installation and Weatherization
- Commercial Blueprint Reading for Insulators, Welded Frame-Mobile Tower Scaffolds
- Commercial & Industrial Insulation Installation, Aerial Lift
- Energy Conservation Codes and Standards for Insulators
- Green Advantage
- CalGreen

Pile Driver Apprentice

- Worker Safety & Tool Skills for Pile Drivers - Fall Protection
- The Pile Driver Apprentice & The Trade, Construction Math
- Rigging
- Concrete & Formwork
- Welding 1 - SMAW (Shielded Metal Arc Welding) 1F, 2F, 3F, 4F
- Introduction to Pile Driving Land & Water - Aerial Lifts
- Welding 2 - SMAW 1G, 2G - Fork Lifts
- Advanced Pile Driving - Land & Water
- Wharfage & Marine Structures
- Welding 3 - SMAW 3G Certification
- Introduction to Structural Blueprints & Layout Instruments
- Bridge Building & Advanced Structural Blueprints
- Falsework, Shoring & Heavy Timber Framing
- Advanced Formwork
- Welding 4 - SMAW 4G Certification
- Welding 5 - FCAW 3G Certification
- Welding 6 - FCAW 4G Certification

Shingler Apprentice

- Blueprint Reading - Basic, Union Benefits Presentation
- Flashing, Shakes & Composition
- Blueprint Reading - Advanced
- Shingles, Sidewalls, Tile & Metal
- Rigging

Acoustical Installer Apprentice

- Blueprint Reading - Basic, Union Benefits Presentation
- Commercial Steel Framing
- Installation of Exposed & Concealed Grid Ceilings
- Welded Frame & Mobile Tower Scaffold
- Special Ceiling Systems, Aerial Lift.
- Introduction to Welding & Cutting
- Access Floor Systems
- Integrated Ceilings & Special Techniques
- Blueprint Reading - Advanced
- Layout Instruments

Hardwood Floor Layer Apprentice

- Tools of The Trade, Installation of Wood Floors
- Athletic Floors, Finishing & Repairing Floors
- Blueprint Reading - Basic, Union Benefits Presentation
- Blueprint Reading - Advanced

Millwright Apprentice

- Millwright 16 Hour Safety & Millwright Tool Skills
- The Millwright Apprentice & The Trade
- Math Applications - Fall Protection
- Rigging
- Materials of Construction
- Layout Procedures - Fork Lift (Industrial & Rough Terrain)
- Optical Instruments
- Blueprint Reading - Aerial Lift
- Cutting & Welding 1
- Welding 2 - SMAW
- Monorails
- Conveyors
- Installation of Machinery
- Maintenance of Machinery
- Precision Tools & Shaft Alignment
- Turbines
- Welding 3 – Certification

Scaffold Erector Apprentice

- Introduction to Scaffolds - Confined Space
- Welded Frame & Mobile Tower Scaffold
- Blueprint Reading - Basic, Union Benefits Presentation
- System Scaffold
- Hazard Awareness - Aerial Lift
- Blueprint Reading - Advanced
- Suspended Scaffolds, Shoring Systems
- Tube & Clamp Scaffold
- Layout Instruments
- Blueprint Reading for Scaffold Erectors
- Rigging
- Introduction to Welding & Cutting
- Welding

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

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

DELEGATION ORDER

RETRAINEE - JOB CREATION

Training Proposal for:

Alhambra Hospital Medical Center L.P.

Agreement Number: ET16-0140

Approval Date: August 5, 2015

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

PROJECT PROFILE

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

Number of Employees in:	CA: 460	U.S.: 460	Worldwide: 460
Turnover Rate:	19%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$99,792		$0	$0		$99,792

In-Kind Contribution:	100% of Total ETP Funding Required	$191,105

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	Computer Skills, Continuous Improvement, Medical Skills Training-Preceptor, MS-Didactic	159	8-200	0	$288	$20.55
				Weighted Avg: 16			
2	Job Creation Retrainee SET Priority Rate Medical Skills Training	Computer Skills, Continuous Improvement, Medical Skills-Preceptor, Medical Skills-Didactic	30	8-200	0	$1,800	$29.00
				Weighted Avg: 90			

Minimum Wage by County: Job 1 (SET/Priority): $20.55 per hour for SET Statewide Average Hourly Wage.

Job 2 (SET/Job Creation): $29.00 per hour for Los Angeles County.

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

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

Up to $3.77 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
JOB NUMBER 1		
Administrative Staff		
Technician/Therapist		
Licensed Vocational Nurse		
Registered Nurse		
JOB NUMBER 2		
Registered Nurse		

INTRODUCTION

Founded in 1924, Alhambra Hospital Medical Center L.P. (AHMC) (www.alhambrahospital.com) is a full service, 144 bed acute care hospital that is fully accredited by the Joint Commission. AHMC serves a high percentage of uninsured or Medi-Cal dependent patients, and approximately 50% of AHMC patients utilize Medicare. Services provided by the hospital include radiology, laboratory and diagnostic services, emergency, and intensive/coronary care. This will be the fourth ETP Agreement for AHMC.

PROJECT DETAILS

To ensure AHMC patients are provided quality care, the hospital provides training to guarantee medical staff is fully competent to deliver healthcare services. As a result, AHMC must continue to educate staff members on new technologies and advancements within the healthcare industry. Under AHMC's prior Agreement (ET13-0127), a new Electronic Medical Recordkeeping system was implemented as mandated by the Center for Medicare and Medical and The Joint Commission. Curriculum topics to be delivered under the new agreement include Computer Skills Training as well as new core measures that will improve patient care and provide continued education to incumbent and new medical staff.

To improve quality of care and patient safety, AHMC will implement additional standards and requirements to be utilized in core measures. New requirements will ensure staff is in compliance with Medication Reconciliation Policy that requires a formalized process for creating an accurate list of patients' current medications. Staff then compares the list to those in the patient record or medication orders. By doing so, AHMC ensures medication safety and prevents and/or lowers the number of patient readmissions. Other core measures that have been revamped include Stroke Care, VTE Prophylaxis, and Immunization/Pneumonia Vaccines.

Computer Skills training will also be delivered to newly hired employees to learn how to use the hospital's electronic medical recordkeeping system. Incumbent staff may also be required to participate in training to learn new updates that have been made to the system since its installation in 2012.

Training Plan

ETP-funded training will allow AHMC staff to enhance and improve overall skill sets and increase knowledge to provide quality patient care, promote good customer service, and ensure compliance with regulatory requirements.

Computer Skills (10%): Training will be offered to all occupations to ensure medical staff can navigate the EMR system and document patient information electronically.

Continuous Improvement (20%): Training will be offered to all occupations to improve staff's communication and critical thinking skills, enabling them to work independently.

Medical Skills Training (70%)

New Registered Nurses will receive up to 200 hours of training to ensure they have the skills necessary to work more effectively with patients. New Graduate Nurses will receive Preceptor training by an experienced Registered Nurse to reinforce job duties learned through classroom instruction.

Commitment to Training

AHMC staff will continue to receive mandated training, on-the-job training, and customer relations training. Training can be company-wide and/or job specific depending on the department or specialty.

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

AHMC's Human Resources Department will be responsible for all administrative duties required under this ETP Agreement. Two staff members have been assigned to enroll, track training hours, and meet/work with ETP staff.

Retrainee - Job Creation

AHMC has committed to hiring 30 new Graduate Registered Nurses (Job Number 2). The Panel offers incentives to companies that commit to hiring new employees: higher reimbursement rate and lower post-retention wages. The nurses 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 an effort to provide quality healthcare services, new Graduate Nurses will receive advanced level training to ensure they are prepared to work one-on-one with patients and use complicated medical equipment. Specialized nursing skills will include curriculum to teach new nurses to aid surgical, cardiovascular, and stroke patients. Inexperienced nursing staff will also receive preceptor training, which requires direct supervision of a training coach/mentor to monitor trainee progress to eventually work with patients and execute nursing duties independently.

Special Employment Training/Priority Wage Modification

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. The Panel may modify the minimum wage requirement for companies in priority industries, such as healthcare up to 25% below the state average hourly wage ($20.55). The Hospital is requesting this modification for Job Number 1 trainees.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET13-0127	Alhambra	08/27/12-08/26/14	$166,464	$77,041 (46%)
ET10-0178	Alhambra	09/28/09-09/27/11	$123,480	$106,371 (86%)

*ET13-0127 –During this time, the Hospital faced low patient census; therefore, all new hires were taken on as part-time only, therefore making them ineligible for ETP reimbursement. In addition, the hospital did not have an Educator/Chief Nursing Officer (CNO) in place to coordinate and facilitate training, which resulted in low prioritization and training enforcement.

As of today, a new CNO has been hired and is currently working with the appropriate managers to plan and schedule training, and ensure that medical staff is provided the necessary training on an on-going basis. In an effort to earn the full funding amount in this new proposal, two staff persons have been assigned to coordinate ETP trainee enrollment, tracking training hours, etc. Regular meetings will be scheduled among management to check training status and verify progress of their New Graduate Nursing Program.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

Flex Ed of Chino has been retained to provide continued education training required for healthcare professionals such as Basic/Advanced Life Support, Critical Care, or other certifications. No fee amount has been determined at this time. Other trainers will be identified for ETP record-keeping purposes, as they are retained by AHMC.

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

MEDICAL SKILLS TRAINING – CLINICAL PRECEPTOR

- Emergency Department Training
- Care for Pediatric Patients
- Emergency Care of the Burn Patients
- Emergency Room Nursing Skills
- Patient Assessment & Care
- Triage Nursing Skills

- Intensive Care Unit/Critical Care Unit Training
- Critical Care Nursing Skills
- Hemodynamic Monitoring
- Intracranial Pressure Monitoring and Ventriculostomy
- Patient Assessment & Care
- Pre and Post-Operative Care
- Ventilator & Tracheotomy Care

- Long Term Care Unit (Subacute, Skilled Nursing, Transitional Care & Hospice)
- Patient Assessment & Care
- Geriatric Nursing Skills
- Med/Surg Nursing Skills
- Medical/Surgical Unit Training
- Patient Assessment & Care
- Pre and Post Operative Care
- Medical/Surgical Nursing Skills
- Orthopedic Nursing Skills
- Oncology Nursing Skills
- Operating Room and Post-Anesthesia Care Unit (PACU) Training
- Patient Assessment & Care
- Peri-operative Nursing Skills
- Pre and Post Operative Care
- Rehabilitation Services Unit Training
- Patient Assessment & Care
- Medical/Surgical Nursing Skills
- Pre and Post Operative Care
- Post-Orthopedic Surgery Nursing Skills
- Post-Trauma Injury Nursing Skills
- Post-Neurological Injury Nursing Skills

- Telemetry Unit Training

- Care of the Cardiac Patient
- EKG & Cardiac Monitoring
- Dysrhythmia Interpretation
- Telemetry Nursing Skills
- Pre and Post Operative Care
- Care of the Neurosurgical Patient
- Intravenous (IV) Therapy
- Oncology Nursing Skills

MEDICAL SKILLS TRAINING – DIDACTIC

- Acute Psychiatric Care
- Acute Rehabilitation Skills
- Acute Myocardial Infarction
- Antimicrobial Stewardship (ASP)
- Arterial Blood Gas (ABG) Interpretation
- Body Mechanics
- Cardiac Arrest
- Care of Bariatric Patient
- Care of the Cardiac Patient
- Care of the Neurosurgical Patient
- Care of the Stroke Patient
- Central Lines Management
- Chest Tube Care & Management
- Code Blue Response & Procedures
- Critical Care Nursing Skills
- Decontamination Procedures
- Diabetes Care & Management
- Dysrhythmia Recognition & Interpretation
- Educating the Patient & Family
- EKG & Cardiac Monitoring
- Electroencephalogram (EEG) Review
- Emergency Room Nursing Skills
- End of Life Care
- Equipment Skills (IV pumps, cardiac telemetry, vital signs, pulse-oximeter, ventilators, specialty beds and mattresses, etc.)
- Evidence Based Practices
- Gastrointestinal Assessment and Management
- Hemodynamic Monitoring
- Infection Control
- Intravenous (IV) Insertion & Therapy
- 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 Centered Care
- Patient Fall Prevention
- Peri-operative Nursing Skills
- PICC Line Insertion
- Pre and Post-Operative Care
- Psychiatric Nursing Skills
- Psychotropic Medications
- Rapid Response Skills
- Renal Assessment & Management
- Respiratory Assessment & Care
- Restraints
- Surgical Nursing Skills
- Telemetry Nursing Skills
- Total Parenteral Nutrition (TPN)
- Transfer Techniques
- Triage Nursing Skills
- Ventilator and Tracheotomy Care

MEDICAL SKILLS (TECHNICIANS/THERAPISTS)

- New Analytical Instrumentation Technology Policies & Procedure for Dietary
- New Analytical Instrumentation Technology Policies & Procedure for Laboratory
- New Analytical Instrumentation Technology Policies & Procedure for Radiology
- New Analytical Instrumentation Technology Policies & Procedure for Respiratory
- New Analytical Instrumentation Technology Policies & Procedure for Therapists
- New Pharmaceutical Instrumentation Technology Policies & Procedure for Pharmacy
- Pump and Equipment
- Wound & Skin Care

CONTINUOUS IMPROVEMENT

- Adverse Drug Event
- Adverse Event Reporting
- Care Coordination Plan
- Case Management/Discharge Planning
- Charge Nurse Training/Frontline Leadership Skills
- Communications Skills
- Conflict Resolution Skills

- CORE Measures
- Critical Thinking Skills
- Culturally Appropriate Care
- Customer Service Skills
- Meaningful Use
- Monitor on the Appropriate Antibiotic Usage
- National Patient Safety Goals
- Patient Safety Culture
- Preceptor Skills (train-the-trainer)
- Performance and Quality Improvement and Procedures Skills
- Process Improvement
- Safe Patient Handling
- Skills Fair
- Team Work

COMPUTER SKILLS

- Computerized Provider Order Entry (CPOE)
- Electronic Health Record System (EHR--McKesson/Paragon)
- Horizon Patient Folder (HPF)
- Horizon Business Folder (HBF)
- Incident Management Portal (IMP)

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

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Arrow Sign Co.

Small Business ≤ $50,000

ET16-0150

Approval Date: August 17, 2015

ETP Regional Office: San Francisco Bay Area **Analyst:** R. Jackson

CONTRACTOR

- Type of Industry: Manufacturing

  Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees

  California: 70

  Worldwide: 70

  Number to be trained: 34

  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: $12,688
- In-Kind Contribution: $19,350

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	Commercial Skills, Computer Skills, Mfg Skills, Continuous Impr, OSHA 10/30, Management Skills, Business Skills	20	8-60	0	$416	$16.44
				Weighted Avg: 16			
2	Retrainee SB<100 Priority Rate HUA	Commercial Skills, Computer Skills, Mfg Skills, Continuous Impr, OSHA 10/30, Management Skills, Business Skills	14	8-60	0	$312	*$11.30
				Weighted Avg: 12			

*It will be made a condition of contract that the trainees in Job Number 2 will never be paid less than the statewide minimum wage rate as in effect at the end of retention, regardless of the wage expressed in this table.

- Reimbursement Rate: Job #'s 1 and 2: $26 SB Priority
- County(ies): Alameda, San Joaquin
- Occupations to be Trained: Crane Operator, Welder, Fork Lift Operator, Truck Driver, Installation Staff, Production Staff, Sales Staff, Administrative Staff, Manager, Supervisor
- Union Representation: ☒ Yes ☐ No
- Health Benefits: Job #'s 1 and 2: $2.65 per hour

SUBCONTRACTORS

- Development Services: NA
- Administrative Services: NA
- Training Vendors: Fred Pryor & All Crane Training (Oakland), H&H Trucking (Tracy), A-1 Trucking (Hayward) will provide some of the Commercial Skills for a fee to be determined.

OVERVIEW

For over 60 years, Arrow Sign Co. (Arrow) has manufactured electric and architectural signs for major hotels, property management companies, building owners, shopping centers, and general contractors who build structures such as stadiums, airport facilities and hospitals. As a full service sign company, Arrow provides initial design concepts up to detailed plans. The Company also provides fabrication, installation and maintenance. Its products are used primarily for brand identification and visibility of a store, outlet or location.

Arrow uses Computer-Aided Design and Computer-Aided Manufacturing software that is integrated for design and fabrication. The use of this technology allows the Company to create and develop high-end, custom-designed signs, giving it a competitive advantage over companies that lack the technology.

Training Plan

This will be Arrow's second ETP Agreement. The focus of this proposal differs from the last Agreement due to growing market demands for interior signs, new developments in sign making, and increased competitiveness in securing contracts through changing bidding processes.

Additionally, training is needed for new equipment and skills upgrades (including new trucks, cranes, and software) and cross-training to boost productivity and efficiency. Currently, the Company only has two employees able to operate and repair the new trucks. The Company plans to add 14 more employees which will allow more customer orders to be completed with greater scheduling flexibility. It will also allow the Company to reduce costs by keeping vehicle maintenance work in-house.

A few items in the proposed training topic list (Forklift, Microsoft Office, Crane Operations and Welding) were also delivered in the last Agreement, but the content has been refreshed. Trainees will not repeat the same subject matter.

Business Skills - Training will be offered to Administrative Staff, Sales Staff, Managers, and Supervisors. Training will assist the Company as they manage new product initiatives and implement ongoing business changes, such as reforms in industry bidding processes to support growth. Expanding the skillsets of employees reinforces the Company's high performance workplace goals by making each employee more adaptable, enabling them to make better quality decisions independently, and allowing them to complete tasks with greater efficiency.

Commercial Skills - Training will be offered to Production Staff, Crane Operators, Welders, Forklift Operators, Installers, and Truck Drivers. The Company aims to cross-train employees to diversify their current specializations. This will improve the ability of individual employees to perform more functions and services in order to boost overall productivity, improve safety, and gain specific competencies. Note: all driving related training will be delivered by vendors that offer certifications. However, the training does not include certifications. The training exceeds those requirements and is therefore deemed supplemental.

Management Skills - Training will be offered to Supervisors and Managers only. Recently promoted Supervisors and Managers were assessed as needing additional communication and leadership skills. Training will help the Company meet or exceed industry expectations pertaining to the management of Human Resources.

Computer Skills - Training will be offered to Administrative Staff, Sales Staff, Manager and Supervisors. Microsoft Office products like Gaant Charts and Microsoft Project are being used by key contractors. Thus, the Company has recognized the need to train with the newest software to keep pace with customer demands and meet the company's efficiency goals.

Manufacturing Skills - Training will be offered to Production Staff. This training aims to speed product fulfillment and increase the skills of staff to diversify abilities to accept assignments or tasks while simultaneously decreasing the time to completion on customer orders. Newly purchased machinery including a CAD machine, various welding tools, and metal benders was purchased to keep pace with business changes.

Continuous Improvement - Training will be offered to all staff. This training will help the Company improve efficiency.

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.

Arrow has identified Production Staff employees, Welders, and Installers, that may attend OSHA 10. Frontline Managers or Supervisors may attend OSHA 30. High safety ratings will make Arrow more attractive to potential contractors. It also helps the Company maintain a safe work environment with better trained employees.

High Unemployment Area

The 14 trainees in Job Number 2 work in Stockton, a High Unemployment Area (HUA) with unemployment exceeding the state average by at least 25%.

Wage Modification

For trainees in an HUA, the Panel may modify the ETP Minimum wage by up to 25% if post retention wages exceed the start of training wages. Arrow requests a 25% wage modification from $15.07 to $11.30 for trainees in Job Number 2.

Union Letter

The Welders are represented by Iron Workers Local 378. A letter of support has been received from Local 378 (enclosed).

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET13-0305	Oakland, Stockton	03/08/2013 – 03/07/2015	$45,760	$13,104 (29%)

In ET13-0305, Arrow encountered difficulty releasing employees for training due to peak business periods. The Company was not aware of how much administration the Agreement required. To ensure better performance, the Company has planned its training schedules around the peak periods. In addition, the funding amount has been "right-sized" to reflect prior earnings.

Exhibit B: Menu Curriculum

Class/Lab Hours
8-60

Trainees may receive any of the following:

BUSINESS SKILLS
- Public Speaking
- Problem Solving
- Negotiations
- Contract Reading & Writing
- Accounting Principles

COMMERCIAL SKILLS
- Outriggers
- Power Takeoff Systems (PTO)
- Auxiliary Welders and Generators
- Pre and Post Driving Inspections
- Crane Operation
- Skid Steer Training
- Welding
- Repelling

COMPUTER SKILLS
- Microsoft Office

CONTINUOUS IMPROVEMENT
- Improving Sales Skills
- Efficiency Training
  - Planning, Scheduling, and Prioritizing

MANAGEMENT SKILLS (Managers and Supervisors only)
- First Time Supervisors
- Problem Solving
- Success through Communications
- Affordable Care Procedures

MANUFACTURING SKILLS
- Forklift Driving
- Blueprint Reading
- Welding

OSHA Training
- OSHA 10
- OSHA 30

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery.

IRON WORKERS LOCAL 378

UNION OFFICE OF BRIDGE, STRUCTURAL, ORNAMENTAL AND REINFORCING

3120 Bayshore Road, Benicia CA 94510 | www.ironworkers378.org

P. (707) 746-6100 | F. (707) 746-0979

AFL-CIO

Robert J. Lux
President
Business Agent

Jeff McEuen
Business Manager
Financial Secretary-Treasurer

Jason Gallia
Vice President/
Business Agent

Ken Miller
Business Agent/
Organizer

July 7, 2015

Mr. Robert Jackson
1065 East Hillsdale Blvd STE 415.
Foster City CA 94404

Mr. Robert Jackson:

The following letter serves to confirm that Arrow Sign Co. has been in accordance with our rules, regulations, and have complied with our Collective Bargaining Agreement.

We are very satisfied with the overall performance of this company, and we authorize Arrow Sign Co. to conduct specialized training to Iron Worker Local Union No. 378 members that is not included in our Training Facility curriculum.

Should you have any questions or concerns, please feel free to contact our office at (707) 746-6100.

Regards,

Robert Lux
President
Business Agent

RL:mf
Opeiu-29/AFL-CIO

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Associated Microbreweries, Inc. dba Karl Strauss Brewing Company

Agreement Number: ET16-0130

Approval Date: July 21, 2015

ETP Regional Office: San Diego **Analyst:** M. Ray

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Manufacturing Retail Services Priority Industry: ☒ Yes ☐ No
Counties Served:	San Diego	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 146	U.S.: 146	Worldwide: 146
Turnover Rate:	16%		
Managers/Supervisors: (% of total trainees)	10%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$52,380		$0	$0		$52,380

In-Kind Contribution:	100% of Total ETP Funding Required	$75,950

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Continuous Improvement, Manufacturing Skills	97	8 - 200	0	$540	$15.93
				Weighted Avg: 30			

Minimum Wage by County: $15.93 per hour for San Diego County
Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe
Health benefits of up to $2.75 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		11
Events Staff		3
Information Technology		4
Logistics		7
Sales/Marketing		30
Restaurant Operations		7
Production		25
Manager		10

INTRODUCTION

Founded in 1989, and located in San Diego, Associated Microbreweries, Inc. dba Karl Strauss Brewing Company (Karl Strauss) (www.karlstrauss.com) engages primarily in production, sales, and distribution of beer to restaurants, bars, grocery stores, as well as private and public events. In addition to beer production, the Company also operates eight full-service brewery restaurants in Southern California.

This will be the third Agreement between Karl Strauss and ETP within the last five years. In its first project (ET09-0342), the ETP-funded training focused on sales and the addition of a bottling line to the Company's San Diego facility. During this time, Karl Strauss was able to support all brewing and bottling in-house rather than outsourcing to Wisconsin. In its second project (ET12-0358), funding assisted in providing skills training to support the Company's distribution

network expansion to Northern California. During this contract term, Karl Strauss also opened an additional brewery restaurant and transformed its current brewery into a tour and tasting room facility.

PROJECT DETAILS

Karl Strauss continues to face fierce competition from an increasing number of craft beer breweries in the marketplace. In recent years, the craft beer industry has seen exponential growth in California. During 2014, the number of operating breweries increased by over 20%, with an additional 240 breweries in planning. Today, with nearly 500 breweries statewide, California has more craft breweries than any other state. Moreover, a growing number of beer drinkers are expanding their palate and beer knowledge, driving the craft beer market even further. These industry and customer demands have had a significant impact on the Company's production and quality of its products, requiring Karl Strauss to enhance its competitiveness.

To meet these demands, Karl Strauss has immersed in new initiatives focused on integrating sustainability processes, improving efficiencies, and reducing waste. To do this, the Company has invested in developing a "Green Team" to implement and facilitate workforce skills standards, training strategies, and extensive beer education. The Company will also implement a new Learning Management System (LMS) to streamline education/training materials, and become paperless. The LMS will go live during the third quarter of 2015; therefore, it will not be utilized to administer ETP training.

These demands are also driving the Company to focus on growth opportunities. As a predominately Southern California-based distributor, Karl Strauss plans to expand its Northern California territories through bars, eateries, groceries, and convenience stores as well as beer festivals and events. These initiatives will require Karl Strauss to qualify and train its workforce to support company growth, meet overall production demand, and improve product quality.

Training Plan

ETP-funded training will be delivered to approximately 97 incumbent and newly-hired workers in various course topics. The training plan may include employees who have participated in previous contracts and some curriculum topics are repeated; however, Karl Strauss confirmed that the subject matter has been updated and/or improved, so there will be no duplication of training in those courses.

Training will be delivered in classroom/laboratory setting and will take place at the Company's main brewery and corporate headquarters in San Diego.

Business Skills (25%) – Training will be offered to all occupations. Course topics such as Customer Service, Sales/Marketing/Production Strategies, Organizational Development, Strategic Thinking, and SWOT Analysis training will provide supplemental skills to enhance worker's ability to provide exemplary customer service, increase sales, and improve business flow.

Computer Skills (15%) – Training will be offered to all occupations as it relates to their job function. Training in various software application skills will improve productivity. Training in the Company's new LMS will be provided to all trainees to easily track and manage employee training initiatives and effectiveness.

Continuous Improvement (45%) – Training will be offered to all job occupations. Course topics such as Sustainability Processes, Lean Manufacturing, Process Improvement, Quality Concepts, and Product Knowledge will provide trainees the skills necessary to improve

productivity and quality of products. The skills provided by this training are expected to improve the Company's ability to compete with in-state, out-of-state, and overseas competitors.

Manufacturing Skills (15%) – Training will be offered to Production, Events Staff, Logistics Staff, and Managers. Training will help trainees develop and demonstrate competence in good manufacturing practices, equipment operations & maintenance, quality management, and production planning to improve cost and product quality.

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 Infrastructure

  Training will be provided by a combination of six in-house staff and outside vendors. The Company's Training and Development Analyst with assistance from the Human Resources Department will be overseeing and handling project administration duties.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET12-0358*	San Diego	4/17/12 – 4/16/14	$49,248	$38,367 (78%)
ET09-0342**	San Diego	11/24/08 – 11/23/10	$74,772	$14,891 (20%)

***ET12-0358:** The last day of ETP training was 1/16/14. Karl Strauss has documented 2,132 eligible training hours for 46 trainees who completed retention (weighted average training hours of 46) to equal $38,367 (78%) payment earned. In this Agreement, Karl Strauss corrected the issues that caused poor performance on its previous project.

****ET09-0342:** During this Agreement, Karl Strauss experienced production issues which adversely impacted the training schedule. The Company was challenged with balancing production and training need; therefore, some trainees were unable to complete the minimum training hours (24) required for reimbursement.

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

- Accounting/Payroll System
- How to Become a Learning Organization
- Organizational Development
- Cost Control Skills
- Marketing Strategies
- Sales Strategies
- Customer Service
- Production Strategies
- Budget Strategies
- Strengths, Weakness, Opportunities, & Threats (SWOT) Analysis
- Business Performance
- Strategic Thinking

COMPUTER SKILLS

- Human Resources Information System (HRIS)
- Learning Management System (LMS)
- jLAN Mobile Sales Suite Software Application
- Manufacturing Resource Planning
- Intermediate Microsoft Office
- Intermediate Microsoft Excel
- Intermediate PowerPoint
- Beta Testing
- Market Data Warehousing
- Microsoft Project

CONTINUOUS IMPROVEMENT

- Transformational Coaching
- Process Involvement
- Process Improvement
- Problem Solving Skills
- Decision Making Skills
- Overcoming Objections
- Sustainability Processes
- Lean Manufacturing
- Teambuilding Skills
- Quality Concepts
- Presentation Skills
- Effective Communication
- Product Knowledge
- Negotiation Skills
- Leadership Skills
- Conflict Management
- Time Management
- Project Management

MANUFACTURING SKILLS

- Manufacturing Leadership
- Engineering Economics
- Visual Manufacturing & Communication
- Cost Concepts
- Risk Management
- Equipment Operations & Maintenance
- Material Requirements and Management
- Inventory Control
- Good Manufacturing Practices
- Quality Management
- Production Planning

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

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Booth Ranches LLC

Small Business ≤ $50,000

ET16-0137

Approval Date: July 31, 2015

ETP Regional Office: Sacramento **Analyst:** M. Mazzone

CONTRACTOR

- Type of Industry: Agriculture

  Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees

  California: 98

  Worldwide: 98

  Number to be trained: 96

  Owner ☐ Yes ☒ No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☒ Yes ☐ No
- Turnover Rate: 6%
- Repeat Contractor: ☒ Yes ☐ No

FUNDING

- Requested Amount: $49,920
- In-Kind Contribution: $60,000

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate SB<100	Business Skills, Computer Skills, Commercial Skills, Cont. Imp., Hazardous Mat., Mgmnt. Skills, Mfg. Skills	82	8-60	0	$520	$15.07
				Weighted Avg: 20			
2	Retrainee Priority Rate SB<100 HUA	Business Skills, Computer Skills, Commercial Skills, Cont. Imp., Hazardous Mat., Mgmnt. Skills, Mfg. Skills	14	8-60	0	$520	*$11.30
				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.

- Reimbursement Rate: Job #'s 1 & 2: $26 SB Priority
- County(ies): Fresno
- Occupations to be Trained: Administrative Staff, Sales Representative, Citrus Farmer, Packing Staff, Horse Farmer, Cattle Farmer, Supervisor, Manager
- Union Representation: ☐ Yes ☒ No
- Health Benefits: Job #1: $3.23 per hour Job #2: $2.30 per hour

SUBCONTRACTORS

- Development Services: Strategic Business Services, LLC, Visalia, provided development services for a flat fee of $3,500.
- Administrative Services: Strategic Business Solutions, LLC will also provide administrative services for a fee not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

OVERVIEW

Booth Ranches LLC (Booth Ranches) (www.boothranches.com) was founded in 1957 and is family-owned and operated. The Company's main product is oranges, which are grown on 8,500 acres located in Fresno and Kern Counties. The oranges are sold to food markets and

retail chain stores throughout the Western United States. In addition, Booth Ranches operates two other divisions, Horse and Calf/Cattle Division. These divisions sell horses and cattle throughout the Western United States.

Booth Ranches has three locations within Orange Cove that will participate in training under this proposal. This is the second ETP-funded agreement for Booth Ranches.

Training Plan

Booth Ranches first ETP project focused on increasing production efficiency. The Company was able to make improvements by investing in production equipment such as new case and labeling equipment, packaging equipment and an In-Scan bar code scanning system. Although some of the curriculum topics are similar in this new proposal to the previous contract, trainees will not repeat training. Similar training topics will be advanced versions to further improve internal processes. Booth Ranches is undergoing significant changes due to drought conditions and out-of-state competition. To remain competitive, Booth Ranches will train staff in a diverse array of skills to ensure sustainability. New skills will allow staff to increase production and reduce water usage by increasing efficiency.

Training will focus on improving Lean processes and sustainable farming practices. To meet these goals, the Company is installing new irrigation systems and harvesting equipment in the Fall of 2015. In addition, Booth Ranches is going live with new operations and inventory management software programs in August 2015.

The Company also plans to deliver training on the repair and maintenance of wind machines, hazardous materials, account development, customer service, pest control and agronomy.

Booth Ranches training will be delivered via Classroom/laboratory, Videoconference and E-Learning. Trainees will receive up to 60 hours of training. To decrease the costs associated with training, Booth Ranches may use Videoconference and E-Learning training amongst the three participating locations in Orange Cove.

Business Skills: Training will be delivered to Administrative Staff, Sales Representatives, Supervisors and Managers. Training will focus on exceptional customer service to ensure repeat customers. Additionally, trainees will learn sales techniques, projecting, special orders and issue resolution. Trainee topics include Account Development, Customer Service and Sales Skills.

Commercial Skills: Training will be delivered to Citrus Farmers, Packing Staff, Horse Farmers, Cattle Farmers, Supervisors and Managers. Training will focus on the installation of a new inrrigation system, the wind maches servicing and identifying crop and livestock needs. Training topics include Wind Machine Repair and Maintenance, Agronomy Best Practices, Pest Control Best Practices, Irrigation System Installation and Management, Fall Protection and Respiratory Protection.

Management Skills: Training will be delivered to Managers and Supervisors. Training will focus on a single course topic, Strategic Planning, which will provide leaders with the ability to plan and implement realistic and achievable company goals.

Computer Skills: Training will be delivered to all occupations. The goal is to improve efficiencies with the use of current software programs and to provide staff the skills necessary to operate the new software. Training topics include Agknowledge Software, In-Soft Software, In Scan Software and Tableau Software.

Manufacturing Skills: Training will be delivered to Citrus Farmers, Packing Staff and Supervisors. Booth Ranches is updating the equipment used to harvest fruit. Training will be focused on the operation and maintenance of equipment necessary to harvest and package oranges. Training topics include Mechanized Harvesting Equipment Operation, Production Equipment Safe Operation and Maintenance, Materials Handling Equipment Training and Fork Lift Training.

Continuous Improvement: Training will be delivered to all occupations and introduce Lean principles in all areas of the Company. Phase one will focus on basic Lean concepts to improve efficiency and management of resources, while reducing wastes. In addition, Sustainable Farming Practices will provide staff with training on water management, crop diversification, soil management, and renewable energy options. Training topics will include Lean Processes, Food Processing Safe Practices and Sustainable Farming Practices.

Hazardous Materials: Training will be delivered to all occupations, excluding Administrative Staff and Sales Representatives. Staff will receive training on the proper handling, storage, transport and clean-up of hazardous materials.

High Unemployment Area

All trainees work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%. The Company's locations in Fresno County qualify for HUA status under these standards. Booth Ranches is requesting a wage modification to $11.30 per hour for 14 trainees in Job Number 2. The 82 estimated trainees in Job Number 1 will meet ETP's standard minimum wage requirement of $15.07 per hour.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

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

Agreement No.	Approved Amount	Term	No. Trainees Enrolled	No. Completed Training	No. Retained
ET14-0114	$52,290	8/01/13 – 7/31/15	97	25	25

Currently, ETP Online Tracking shows 3,074 reimbursable training hours. The Contractor anticipates earning 100% as all 25 trainees who completed training are expected to complete the 90 day retention period successfully. Booth Ranches has not yet submitted a final invoice and $0 is Earned – Approved. Booth Ranches is waiting until all trainees have completed retention and has until August 30, 2015 to submit a final contract close-out invoice.

Exhibit B: Menu Curriculum

Class/Lab/Videoconference Hours

8-60 Trainees may receive any of the following:

BUSINESS SKILLS

- Account Development
- Customer Service
- Sales Skills

COMPUTER SKILLS

- Agknowledge Software Training
- In-Soft Software Training
- In Scan System Training

COMMERCIAL SKILLS

- Wind Machine Repair and Maintenance
- Agronomy Best Practices
- Pest Control Best Practices
- Irrigation System Installation and Management
- Fall Protection
- Respiratory Protection

CONTINUOUS IMPROVEMENT

- Lean Processes
- Food Processing Safe Practices
- Sustainable Farming Practices

HAZARDOUS MATERIALS

- Hazardous Materials Handling
- Hazardous Materials Storage
- Hazardous Materials Transport
- Hazardous Materials Clean-up

MANAGEMENT SKILLS (Managers/Supervisors Only)

- Strategic Planning

MANUFACTURING SKILLS

- Mechanized Harvesting Equipment Operation
- Production Equipment Safe Operation and Maintenance
- Materials Handling Equipment Training
- Fork Lift Training

E-Learning Hours

0-60

COMPUTER SKILLS

- Agknowledge Software Training
- In-Soft Software Training
- In Scan System Training

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

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery.

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

California Health Sciences University, LLC

Small Business ≤ $50,000

ET16-0157

Approval Date: August 17, 2015

ETP Regional Office: Sacramento **Analyst:** L. Fraizer

CONTRACTOR

- Type of Industry: Healthcare Services
  Priority Industry: ☐ Yes ☒ No
- Number of Full-Time Employees
  California: 35
  Worldwide: 35
  Number to be trained: 31
  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: $9,548
- In-Kind Contribution: $15,000

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 SET	Business Skills, Computer Skills, Continuous Impr	31	8-60	0	$308	$16.00
				Weighted Avg: 14			

- Reimbursement Rate: $22 SB Non-Priority
- County(ies): Fresno
- Occupations to be Trained: Administrative Staff, Admissions/Student Services Staff, Marketing/Communications Staff, IT Staff, Faculty Professor, Frontline Manager
- Union Representation: ☐ Yes ☒ No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: Strategic Business Solutions, LLC in Visalia assisted with the development of this project for a flat fee of $671.
- Administrative Services: Strategic Business Solutions, LLC will also provide administrative services for a fee not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

OVERVIEW

California Health Sciences University, LLC (CHSU or University) (www.chsu.org) was formed by a prominent Central Valley family as a remedy for the shortage of healthcare services in their area. This privately-owned University provides an option for health professionals seeking continuing education programs and doctorates. Currently, the University is only operating one program, the College of Pharmacy, at its location in Clovis.

The first class of Doctoral Pharmacist candidates began in August 2014, and a new group of candidates are currently being enrolled for the 2015-2016 school year. However, the University plans to open four more doctoral schools (Allied Health, Dentistry, Podiatry, and Medical School) in the next couple of years.

Need for Training

This will be CHSU's second agreement. The University is requesting ETP funding to continue the training efforts that began under the previous ETP Agreement (ET14-0341). Training in the

previous Agreement primarily focused on newly purchased software systems. For this proposal, CHSU's main focus is on trainees that did not previously participate. These are newer employees who need training on software systems, the academic assessment process, and professionalism in customer and student services. The Company also plans to train all workers on advanced modules of the software programs to help improve quality, capacity and sustainability.

The Curriculum does contain a few courses from the previous Agreement. However, trainees who were included in the previous contract will not be trained in the repeat courses.

Training Plan

Business Skills: Training will be offered to Frontline Managers, Faculty Professors, Administrative Staff and Admissions/Student Services Staff. Training will include course topics such as Academic Assessment Skills, Proposal Writing, Admissions Processes and Classroom Management. Training will insure organizational management, improve information workflow and provide superior customer service.

Computer Skills: Training will be offered to all occupations. Training will allow staff to provide accurate documentation on administrative processes, complete reports quickly and proficiently, and use new software to provide curricular design and accreditation compliance. Trainees will learn to use the Comprehensive Academic Management System (CAMS), ExamSoft Software and Website Development.

Continuous Improvement: Training will be offered to all occupations. Employees will receive training in Leadership, Team Building and Team-Based Learning Theories and Applications. These skills will enable team-based learning theory and principles to enhance the quality of student learning, improve leadership capabilities, and increase product quality.

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.

All trainees work in Fresno County, a High Unemployment Area (HUA) with unemployment exceeding the state average by 25%. The determination of HUA status is based on unemployment data from the Labor Market Information Division of the Employment Development Department.

- Wage Modification

Under HUA provisions, all trainees qualify for the Standard 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. However, CHSU is not asking for a wage modification.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET14-0341	Clovis	05/05/14-05/04/15	$22,000	$9,146 (41%)

CHSU requested training to increase software proficiency, improve best practices and address student learning needs. The contract fell short due to a miscalculation of the amount of training hours required. Funding for ET14-0341 was based on the estimated amount of time needed to complete modules purchased from training vendors. However, CHSU trainees completed the modules in less time than originally projected. The lack of a formalized training plan, coupled with a focus on implementing University programs, resulted in less time to train than initially expected. To improve performance, the University has developed a detailed training plan and adjusted the amount of training time per module. This has decreased the weighted average hours and “right-sized” the amount of funding in the current proposal.

Exhibit B: Menu Curriculum

Class/Lab Hours

8 - 60 Trainees may receive any of the following:

BUSINESS SKILLS

- Admissions Processes
- Proposal Writing
- Classroom Management
- Academic Assessment Skills

COMPUTER SKILLS

- Comprehensive Academic Management System Software
- ExamSoft Software
- Website Development

CONTINUOUS IMPROVEMENT

- Teambuilding
- Leadership
- Team Based Learning Theories and Applications

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

Delegation Order

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Economic Development Collaborative-Ventura County

Agreement Number: ET16-0149

Approval Date: August 17, 2015

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

PROJECT PROFILE

Contract Attributes:	Retrainee SB <100 Priority Rate SET HUA	Industry Sector(s):	Manufacturing Wholesale Trade Services Priority Industry: ☒ Yes ☐ No
Counties Served:	Ventura, Santa Barbara	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☐ Yes ☒ No		
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		≤20%	

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
$93,440		$6,476 8%		$99,916

In-Kind Contribution:	50% of Total ETP Funding Required	$104,720

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Continuous Improvement, Mfg. Skills	70	8-200	0	$770	$15.07
				Weighted Avg: 40			
2	Retrainee SET HUA	Business Skills, Computer Skills, Continuous Improvement, Mfg. Skills	8	8-200	0	$641	$15.07
				Weighted Avg: 40			
3	Retrainee SB <100 Priority Rate	Business Skills, Computer Skills, Continuous Improvement, Mfg. Skills	30	8-60	0	$1,112	$15.07
				Weighted Avg: 40			
4	Retrainee SB <100	Business Skills, Computer Skills, Continuous Improvement, Mfg. Skills	8	8-60	0	$941	$15.07
				Weighted Avg: 40			

Minimum Wage by County: $15.07 per hour for Ventura and Santa Barbara Counties.

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

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Numbers 1 - 4		
Administration Staff		8
Assembler		8
Engineer		4
Machine Operator		12
Maintenance Staff		3
Manufacturing/Production Worker		49
Sales Staff		10
Manager/Supervisor		22

INTRODUCTION

Founded in 1996, the Economic Development Collaborative - Ventura County (EDC-VC) (www.edc-vc.com) is a regional public and private economic development partnership located in Camarillo. The EDC-VC is a community resource that promotes jobs and economic growth through programs and services that focus on business attraction, retention, and expansion. The EDC-VC supports businesses in Camarillo, Fillmore, Moorpark, Ojai, Oxnard, Port Hueneme, Santa Paula, Simi Valley, Thousand Oaks, and Ventura. The EDC-VC is eligible for ETP funding as a repeat contracting group of employers, specifically a professional membership association.

The EDC-VC provides small and medium-sized business consulting, technical assistance, lending, and training, and is the Small Business Administration's designated Small Business Development Center (SBDC) for Ventura and Santa Barbara Counties. The EDC-VC is a contract partner for the Ventura County Workforce Investment Board for incumbent worker services, layoff aversion, and coordinating training services. The EDC-VC also administers a revolving loan program for the U.S. Department of Commerce, and augments funding with private bank capital and loan capital provided through First Five Ventura County. In addition, the EDC-VC is a contract partner with the City of Ventura for its business incubator and regional entrepreneurship services.

The EDC-VC expects to provide consulting, training, and lending services to over 600 firms this year. Its clients include companies in manufacturing, trade, transportation and warehousing, professional and business services, leisure and hospitality, and other services. The EDC-VC has a targeted manufacturing and export trade program. Most of the training is concentrated in manufacturing to help employers become more efficient and allowing them to expand into new markets, particularly international trade.

PROJECT DETAILS

This proposal will serve large and small priority and non-priority businesses with out-of-state competition. A small percentage of the training (Job Number 2) will be provided to employers lacking out-of-state competition under the Panel's SET program. The core group of participating employers represents at least 80% of requested funding. Training is scheduled to begin in early August. EDC-VC anticipates that 100% of the training will be held at employer worksites.

Employers working with the EDC-VC have identified operational efficiencies that will make them more competitive in securing new contracts and entering new markets. As a result of becoming more efficient, these firms will have the foundation to diversify their customer bases, which will improve their profitability and their ability to sustain and grow business in the long term.

Training Plan

Business Skills - Training will be offered to all occupations to improve all levels of communication and customer service. Sales trainees will also learn sales and business strategies that stimulate growth.

Computer Skills - Training will be offered to Administration Staff, Sales Staff, and Managers/Supervisors. Trainees will learn database management skills and how to be more proficient in the use of various business productivity applications.

Continuous Improvement - Training will be offered to all occupations to help workers reach production goals, increase productivity and efficiency, improve product quality, reduce waste,

and develop teamwork strategies to enhance performance and business processes. Trainees will learn to identify and resolve production problems, as well as implement effective process improvements.

Manufacturing Skills - Training will be offered to Assemblers, Machine Operators, Maintenance Staff, and Manufacturing/Production Staff. Trainees will learn current machine and equipment operation, maintenance, and troubleshooting skills.

Marketing and Support Costs

The EDC-VC markets and advertises its programs primarily through the outreach and services of its SBDC. As a regional economic development corporation, the EDC-VC convenes a monthly meeting of the economic development leads at each of Ventura County's ten cities to share information on program resources. It also shares program opportunities through regular Board of Directors communications, which involves 32 public and private sector leaders throughout the County.

For over four years, the EDC-VC has, in conjunction with local Workforce Investment Boards and Job & Career Centers (One-Stops), operated a manufacturing outreach program. This program has resulted in the regional development of a manufacturer's executive roundtable and regular outreach to over 900 manufacturing firms in the region.

The EDC-VC also publishes a monthly e-newsletter, runs ads in the local newspapers and Chamber of Commerce publications, and participates in the monthly regional Chamber Executive meeting, including Chamber of Commerce leads from ten separate regional and local Chambers.

The EDC-VC is requesting 8% support costs for ongoing employer marketing and outreach. These costs will involve contacting, interviewing, assessing, and developing individual training plans throughout the program. In addition to interfacing directly with employers, the CEO will be speaking at events and doing direct outreach to regional economic development partners and firms. The Program Manager will coordinate with small business consultants contracted to deliver SBDC services. Additional cost will include ad placements, mailings, and customizing outreach material. Staff recommends the 8% support costs.

SET High Unemployment Area

Under Special Employment Training (SET), participating employers are not required to demonstrate out-of-state competition. Trainees must be earning at least the statewide average hourly wage at the end of the retention period.

The SET trainees in Job Number 2 work in High Unemployment Areas (HUA), with unemployment exceeding the state average by 25% under the Panel's standards. Some company locations in Ventura and Santa Barbara counties may qualify for HUA status, and therefore, qualify for the ETP Minimum Wage ($15.07 per hour) rather than the Statewide Average Hourly Wage. The EDC-VC is requesting the $15.07 per hour wage for the SET HUA trainees in Job Number 2.

Commitment to Training

ETP funds will not displace the existing financial commitment to training of participating employers. The EDC-VC represents that safety training is, and will continue to be, provided by the participating employers in accordance with all pertinent requirements under state and

federal law.

- Training Infrastructure

Project administration will be done by EDC-VC staff: the President will provide general oversight; the SBDC Director will oversee employer outreach and assessment and development of individual training plans; a Program Assistant will work with the training vendors to assure accurate tracking of all training hours and recordkeeping; and the Office Manager will provide administrative services for invoicing, oversight, and quality assurance on data tracking.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
*ET13-0162	Camarillo	10/08/12 – 10/07/14	$258,961	$144,662 (56%)
**ET10-0206	Camarillo	09/24/09 – 09/23/11	$73,783	$50,770 (69%)

*ET13-0162 - The Contractor reports that performance was impacted because key participating employers had to postpone multiple training sessions due to increases in business demand. To mitigate this issue in the next project, EDC-VC has implemented an agreement structure whereby employers must commit to a specific training schedule during the course of the Agreement. If employers fail to meet their scheduled timeframe, the EDC-VC will shift available funds to employers that are readily prepared to move forward. In addition, the EDC-VC has improved its internal operating procedures to address any gaps in communication, scheduling, and data collection. Lastly, EDC-VC's has scaled back its funding request to an amount that is consistent with past experience and program performance.

******ET10-0206 - This Agreement was primarily an entrepreneurial/microenterprise pilot endeavor for training in import/export trade. The Contractor finished with 51 approved placements for start-up business owners, as well as small, established business owners that had to attend training outside of normal work hours. Due to scheduling problems, the final class had to be expedited and shortened to meet employer demand; otherwise, the contract would have exceeded the Panel's 70% retraining performance threshold.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours
8 – 200 (Job Numbers 1 & 2)
8 – 60 (Job Numbers 3 & 4)

Trainees may receive any of the following:

BUSINESS SKILLS

- Communication Skills
- Customer Service
- Sales Skills

COMPUTER SKILLS

- Database Management
- Enterprise Resource Planning

CONTINUOUS IMPROVEMENT

- Building Successful Teams
- Interpreting and Analyzing Data
- ISO Training
- Leadership Skills for Frontline Workers
- Lean Manufacturing
- Kaizen Methodology
- Performance Management
- Problem Solving
- Process Improvement
- Root Cause Analysis
- Six Sigma
- Statistical Process Control
- Total Quality Management

MANUFACTURING SKILLS

- Production Equipment Operation
- Manufacturing and Assembly
- Equipment Troubleshooting
- Shop Measurements
- Industrial Maintenance
- Machine Set-Up

Note: Reimbursement for retraining is capped at 200 total training hours per trainee in Job Numbers 1 and 2, and 60 total hours per trainee in Job Numbers 3 and 4, regardless of the method of delivery.

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Eminence Healthcare, Inc.

Small Business ≤ $50,000

ET16-0141

Approval Date: July 27, 2015

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

CONTRACTOR

- Type of Industry: Services

  Priority Industry: ☐ Yes ☒ No
- Number of Full-Time Employees

  California: 48

  Worldwide: 48

  Number to be trained: 48

  Owner ☒ Yes ☐ No
- Out-of-State Competition: No OSC
- Special Employment Training (SET): ☒ Yes ☐ No
- High Unemployment Area (HUA): ☒ Yes ☐ No
- Turnover Rate: 10%
- Repeat Contractor: ☒ Yes ☐ No

FUNDING

- Requested Amount: $40,128
- In-Kind Contribution: $55,000

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, Computer Skills, Cont. Imp., Commercial Skills	48	8-60	0	$836	$16.50
				Weighted Avg: 38			

- Reimbursement Rate: $22 SB Non-Priority
- County(ies): Fresno
- Occupations to be Trained: Substance Abuse Counselors, Administrative Staff, Clinical Supervisor, Eligibility Coordinator, Outreach Coordinator, Information Technology Staff, Quality Assurance Coordinator, Owner
- Union Representation: ☐ Yes ☒ No
- Health Benefits: $1.50 per hour

SUBCONTRACTORS

- Development Services: Strategic Business Solutions, LLC of Visalia assisted with development of this proposal for a flat fee of $2,534.
- Administrative Services: Strategic Business Solutions, LLC will also assist with administrative services for a fee not to exceed 13% of earned funds.
- Training Vendors: To Be Determined

OVERVIEW

Founded in 2005 and located in Fresno, Eminence Healthcare, Inc. (Eminence) (www.eminencehc.com), is an out-patient substance abuse and mental health clinic. Eminence provides counseling services focused on cognitive, behavioral and motivational enhancement to encourage behavior change. Staff uses a variety of therapies to reduce community and individual problems related to metal health issues and drug abuse. This is the Company's second ETP Agreement.

Need for Training

Eminence seeks to be in the forefront of changing mental health therapy trends and procedures to provide the best possible care for patients. Recently, Eminence has developed proprietary software that will allow incumbent workers to be more efficient and promote a high standard of care. Electronic Medical Records System (EMRS) training will take place in August 2015 and will allow all employees to have a proficient working knowledge of the system and its applications. This training will enhance treatment plans and insure accurate input of health care information. The EMRS will allow staff to track patient drug usage and record data to provide the best possible treatment.

Eminence intends to cultivate the skills necessary to develop treatment plans and ensure proper coverage and utilization at all clinic sites. This training will focus on time management, efficiency, prescribed treatment intervals, as well as availability for open door counseling. Eminence intends to enhance the admissions and screening process with training on Insurance Health Care Providers, School District Protocols, and Treatment Plan Protocols. This training will allow Eminence to provide a “wholistic” approach to treatment and maintain the highest level of patient care.

Eminence plans to provide training on Group Counseling techniques and principles. According to the Company, group therapy is becoming more prevalent in substance abuse facilities as a means of treatment. Eminence also plans to train on Support Group Counseling and Cognitive-Behavior Counseling to provide the most up-to-date counseling services.

Training Plan

Business Skills: Training will be provided to Administrative Staff, Clinical Supervisor, Eligibility Coordinator, Outreach Coordinator, Quality Assurance Coordinator and the Owner to improve communications, critical thinking and problem solving skills. Courses will include Admissions, Eligibility Requirements, Patient Screening Process and Strategic Planning.

Commercial Skills: Training will be offered to Substance Abuse Counselors to ensure a uniform method of assessment is being used for all patients. Courses will include Patient Assessment Skills, Group Counseling Techniques and Intervention Protocols.

Computer Skills: Training will be offered to all occupations to effectively utilize and support the Company’s electronic healthcare systems. Courses will include Electronic Medical Records System, Microsoft Office Suite and Epitomax.

Continuous Improvement: Training will be provided to all occupations to improve teamwork, processes and productivity throughout the clinic. Courses will include Four Pillars of Success.

SET/High Unemployment Area

All trainees work in a high unemployment area, with unemployment exceeding the state average by 15%. These trainees qualify for the ETP Minimum Wage rather than the Statewide Average Hourly Wage.

- SET Wage Modification

  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. Eminence is requesting a wage modification to $16.50.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET10-0138	Fresno	09/04/2009-09/03/2011	$52,800	$27,150 (51%)

During the term of its contract, Eminence worked almost exclusively with schools. Many of these schools lost their federal/state funding. Losing many key customers severely impacted Eminence's business – and many workers were laid off. The Company's focus necessarily shifted from training to obtaining new customers. As a result, project performance was negatively impacted. However, since its last contract, Eminence has expanded its customer base to include customers that are not dependent upon state/federal funding. Eminence now has an experienced training coordinator and public agency liaison to coordinate training. And to ensure this project is successful early on, Eminence has scheduled a significant amount of training for August and September 2015.

Exhibit B: Menu Curriculum

Class/Lab Hours

8-60 Trainees may receive any of the following:

BUSINESS SKILLS
- Site Planning
- Scheduling
- Admissions
- Eligibility Requirements
- Patient Screening Process
- Strategic Planning

COMPUTER SKILLS
- Electronic Medical Records System
- Microsoft Office Suite
- Epitomax
- TriPPP System

CONTINUOUS IMPROVEMENT
- Four Pillars of Success

COMMERCIAL SKILLS
- Patient Assessment Skills
- Group Counseling Techniques
- Intervention Protocols
- Substance Abuse Counseling Protocols

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

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Golden Eagle Manufacturing

Small Business ≤ $50,000

ET16-0120

Approval Date: July 20, 2015

ETP Regional Office: North Hollywood **Analyst:** J. Romero

CONTRACTOR

- Type of Industry: Manufacturing
  Aerospace and Defense
  Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees
  California: 9
  Worldwide: 9
  Number to be trained: 9
  Owner ☒ Yes ☐ No
- Out-of-State Competition: Competitors Outside CA
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 11%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $12,168
- In-Kind Contribution: $12,170

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, Cont. Imp., Mfg. Skills, PL-Mfg. Skills	9	8 - 60	0	$1,352	$15.97
				Weighted Avg: 52			

- Reimbursement Rate: $26 SB Priority
- County(ies): Los Angeles
- Occupations to be Trained: Owner, Production Staff, Management Staff, Administrative Staff, Sales Staff
- Union Representation: ☐ Yes ☒ No
- Health Benefits: $1.95 per hour

SUBCONTRACTORS

- Development Services: Assured Incentives Group (AIG) in San Clemente assisted with development for a flat fee of $1,000.
- Administrative Services: AIG will also provide administration services for an amount not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

OVERVIEW

Founded in 1980, Golden Eagle Manufacturing (GEM), (www.goldeneaglemfg.com) is a high-precision machine-part manufacturing company located in San Dimas. The Company specializes in engine re-sleeving; and various engine parts used in the aerospace, military, government defense and auto-sports industries. Besides having their own product line, GEM is also a subcontract manufacturer for other companies who sell directly to large companies for bulk job orders.

The Company was hit hard by the recession and found it difficult to stay in business and retain staff. As a result, GEM lost its qualification as a certified company able to do business with the aerospace industry. GEM had to tap other markets such as the automotive industry to stay in business. Currently, the Company supplies engine parts used in drag racing companies for clients such as Bergenholtz Racing, Kubo Racing, Bisimoto, and Chris Rado With this training plan, GEM hopes to recertify in ISO 9001:2008/AS9100C QMS to regain their former niche in the aerospace industry and expand their product radius to other markets. This will be GEM's first ETP Agreement.

Training Plan

Training will be provided at GEM's facility in San Dimas by a combination of in-house staff and outside vendors.

Business Skills: Training will be offered to the Owner, Management and Administration Staff. Training includes contract review, supplier management, customer service, document control & inventory control to have a clear understanding of processes.

Manufacturing Skills: Training will be offered to Production Staff in the proper use of equipment. Training will assist in compliance with all documented standard operating procedures involved in the manufacturing process and result in increased cost savings, reduction of cycle time while producing a much better product. Workers will be cross-trained in machine operations, set-up and change over which are crucial steps in maintaining productivity as workloads shift from one job to the next. Workers will also receive additional machine training across various control stations to upgrade skill and involvement in the manufacturing process.

Continuous Improvement: Training will be offered to Production, Management and Administration Staff and include ISO9001:2008 and AS9100C quality manual for implementation, testing and inspection. Skills acquired from this training will enable workers to properly document processes and revise control procedures, identify order compliance errors and product non-conformances. This training will also give staff the ability to provide corrective actions and propose preventive measures which are required by ISO standard certification.

Productive Laboratory

In a Productive Laboratory (PL) setting, trainees may produce goods for profit as part of the training, in the courses identified under the Curriculum and with no more than one trainee per instructor. The instructor must be dedicated to training delivery during all hours of training.

It is very challenging to train workers how to operate the Company's technical equipment properly and safely. GEM, being a small company, operating with limited funds, cannot afford to keep excess inventory of raw materials for training purposes only. Training in a Productive lab (PL) setting will benefit the Company and its employees by allowing GEM to train while real-time production runs.

GEM plans to provide a small portion of PL training in Manufacturing Skills to Production Staff in specifically machine/equipment operations and technical-tools handling. The Company is will deliver up to 20 hours of PL training with a trainer-to-trainee ratio of 1:1. Training equipment will include CNC machines, lathes, milling machines, optical comparators and various measuring and hand tools.

RECOMMENDATION

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 60

Trainees may receive any of the following:

CONTINUOUS IMPROVEMENT

- ISO 9001:2008/AS9100C QMS
- ISO Internal Audits
- Inspection Techniques & Requirements
- Production Workflow
-

MANUFACTURING SKILLS

- Standard Milling Techniques
- CNC Screw Machine Set-Up & Operations
- Conventional Lathes Manufacturing
- Precision Grinding & Deburring

BUSINESS SKILLS

- Financial Management
- Strategic Planning
- Quoting Procedures
- Sales Planning & Negotiations

Productive Lab

0 – 20

MANUFACTURING SKILLS (ratio 1:1)

- Standard Milling Techniques
- CNC Screw Machine Operations
- Conventional Lathes Manufacturing
  Precision Grinding

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery. PL is capped at 20 hours per-trainee.

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Granville Homes, Inc.

Small Business ≤ $50,000

ET16-0155

Approval Date: August 13, 2015

ETP Regional Office: Sacramento **Analyst:** M. Jones

CONTRACTOR

- Type of Industry: Construction

  Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees

  California: 98

  Worldwide: 98

  Number to be trained: 78

  Owner ☒ Yes ☐ No
- Out-of-State Competition: No OSC
- Special Employment Training (SET): ☒ Yes ☐ No
- High Unemployment Area (HUA): ☒ Yes ☐ No
- Turnover Rate: 5%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $38,532
- In-Kind Contribution: $53,976

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 SET	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement, OSHA 10	78	8 - 60	0	$494	$16.16
				Weighted Avg: 19			

- Reimbursement Rate: Job #1: $26 SB Priority
- County(ies): Fresno
- Occupations to be Trained: Customer Service Representative, Estimator, Purchaser, Production Staff, Quality Assurance Staff, Sales Staff, Design Staff, Accounting Staff, Administration, Owner
- Union Representation: ☐ Yes ☒ No
- Health Benefits: Job #1: $1.16 per hour

SUBCONTRACTORS

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

OVERVIEW

Granville Homes, Inc. (Granville Homes) proposes to serve as the lead in a small business retraining contract with its affiliate, Granville Realty, Inc. (Granville Realty).

Established in 1977 in Fresno, Granville Homes (www.gvhomes.com) began developing land, building high quality homes and neighborhoods. The Company serves the need of providing quality upscale homes at an affordable price. Granville Homes has built over five thousand homes in the central valley over a period of three decades. Granville Homes believes in creating a healthier lifestyle by constructing affordable eco-friendly neighborhoods.

Granville Homes has recieved multiple awards such as the J. D. Powers and Associates highest ranked home design, and prides itself as the new home builder of choice in the Fresno area. Granville Homes believes its mission and values have led to its success and that a continued commitment through re-investment in its employees will lead to continued success.

Need for Training

To remain competitive and keep up with industry demands, Grandville Homes must introduce a more efficient and streamlined way of doing business which includes new marketing techniques and streamlining the Company's overhead. In addition, Granville Homes will meet customer demands and industry standards by creating and improving a more efficient and knowledgeable staff. In order to achieve this they will provide Leadership training, Lean Processes, Quality Control Systems, Effective Communications and Project Management.

The new home housing market has improved in recent years, but has yet to fully recover. To Compete in California's ever changing environment (drought, housing market, and increasing energy costs) Granville Homes is building eco-friendly constructed homes, which will require new skills such as Green Building, Cool Roof Technology, Exterior Wall Foam Installation, R40 Ceiling Insulation, Solid Sheathed Exterior Walls, Mold Prevention, Energy Code Updating and Storm Water Pollution Prevention so that the staff will become more efficient and knowledgeable in the Company's Eco-Smart Technology.

Training Plan

Business Skills - Training will be offered to all occupations to increase efficiencies in departmental skillsets, new marketing techniques and cost controlling for profitability purposes. Training topics will include Sales/Marketing Techniques, Information Workflow and Customer Service

Commercial Skills - Training will be offered to Production Staff, ensuring the most advanced and desired product enters the market. Training topics will include Energy Code Update training, Storm Water Pollution Prevention, and Green Building Best Practices.

Computer Skills - Training will be offered to all occupations which use the Company's computer systems to improve and increase efficiency and productivity. Training topics will include Newstar, Intermediate/Advance Microsoft Product, and CAD training.

Continuous Improvement - Training will be offered to all occupations to ensure future opportunities by creating a team-based culture, ensuring projects are managed and completed efficiently. Training topics will include Leadership, Lean Processes, Project Management, and Effective Communications training.

Training will be conducted by in-house subject matter experts.

Certified Safety Training

<u>OSHA 10.</u> This training will be offered to all Occupations. This 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. 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, and instructors certified by Cal-OSHA.

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. However, trainees working in a High Unemployment Area are allowed to qualify at the ETP Standard Minimum Wages. However, Granville Homes is not asking for a wage modification.

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/Marketing Techniques
- Purchasing Best Practices
- Website Development/Navigation
- Information Workflow
- Data Report Generation/Interpretation
- Customer Service
- Vendor Relations

COMMERCIAL SKILLS
- Green building Best Practices
- Mold Prevention/Abatement Best Practices
- Storm Water Pollution Prevention
- Construction Site Staging/Scheduling
- Energy Code Update Training

COMPUTER SKILLS
- Intermediate/Advance Microsoft Product Training
- Newstar Training
- Yardi Training
- CAD Training
- Data Storage and Operating Server Training

CONTINUOUS IMPROVEMENT
- Leadership Training
- Teambuilding
- Lean Processes
- Financial Statement Preparation
- Quality Control Systems
- Project Management
- Effective Communications

OSHA 10 (Certified OSHA Instructor)
- OSHA 10 (requires completion of 10 hours)

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

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Integrated Media Technologies, Inc.

Small Business ≤ $50,000

ET16-0133

Approval Date: August 17, 2015

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

CONTRACTOR

- Type of Industry: Technology/IT Services
  Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees
  California: 34
  Worldwide: 45
  Number to be trained: 34
  Owner ☒ Yes ☐ No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 5%
- Repeat Contractor: ☒ Yes ☐ No

FUNDING

- Requested Amount: $49,504
- In-Kind Contribution: $78,064

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. Impr.	34	8-200	0	$1,456	$16.00
				Weighted Avg: 56			

- Reimbursement Rate: $26 SB Priority
- County(ies): Los Angeles
- Occupations to be Trained: Administrative Staff, Project/Systems Engineer, Sales Staff, Supervisor/Manager, Owner
- Union Representation: ☐ Yes ☒ No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: Training Funding Source (TFS) in Seal Beach assisted in development for a flat fee of $2,900.
- Administrative Services: TFS will also provide administration services for a fee not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

OVERVIEW

Integrated Media Technology, Inc. (www.imtglobalinc.com), (IMT) is an IT systems integrator, providing architecture, design, strategic business consulting, technical support, implementation, networking, and cloud services. The Company provides in-depth technology support to customers looking to leverage technology through changes to network environments or new technology purchases. Headquartered in North Hollywood with two satellite locations in Los Gatos and Irving, TX, IMT serves the media & entertainment, IT, education, telecommunication, commercial real estate and healthcare industries.

PROJECT DETAILS

With technology constantly changing, IMT must continually train its staff. The Company has concentrated its training plan on staying ahead of new products, technologies, and solution-offerings that are fundamental to its growth. IMT is expanding its services, pressing into new areas such as mobile web application, Interactive Virtual Learning, and Wi-Fi space. Training will help IMT support new product releases. The Company must also train its newer engineers to perform duties previously conducted by outside vendors. The Company contracted with vendors for certain services; however those vendors were purchased by larger corporations, requiring the Company to hire and train its own engineers to replace those vendors. These engineers will have specific training to specialize in the areas that were outsourced before.

Training Plan

This will be IMT's fourth Agreement. Although the Curriculum is similar to that provided in prior ETP contracts, the trainees will not receive the same training received under prior contact. Trainees that have participated in previous Agreements will receive more advanced courses while newer staff will need to take beginner courses.

Business Skills (10%) – Training will be offered to all staff to improve project management, customer relations and marketing.

Computer Skills (80%) – Trailing will be offered to all staff to improve efficiency.

Continuous Improvement (10%) – Training will be offered to all staff to improve processes; develop and improve systems.

Modifications: Training Hours and Contract Term

Small business proposals are capped at 60 hours per trainee. However, IMT is requesting a modification to increase the cap to 200 hours. Newer employees will need the extra training hours to train on all aspects of the training plan while incumbent employees will only need continuing training. In IMT's previous contracts, training hours had to be extended up to 150. Still, some trainees exceeded 150 hours. Due to highly technical and specialized training, newer trainees will receive up to 200 hours.

IMT is also requesting a 24-month agreement term. The 2-year term is necessary, to account for potential increases in production during which the Company must focus its efforts on satisfying customer demand. As a small business, IMT operates with a lean workforce, and while training is a top priority, given the changing nature of the business, the extended term will allow IMT a few extra months to maximize their earnings.

RECOMMENDATION

Staff recommends approval of this proposal including the modifications to the training hours and the contract term.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET14-0289	North Hollywood	01/27/2014-01/26/2016	$49,920	$49,920 (100%)
ET13-0294	North Hollywood	02/04/2013-02/03/2014	$43,680	$43,680 (100%)
ET12-0155	North Hollywood	12/12/2011-12/11/2012	$26,000	$26,000 (100%)

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

BUSINESS SKILLS

- Business Development
- Communication
- Goal Setting
- Leadership
- Marketing
- Negotiation
- Product Knowledge
- Project Management

COMPUTER SKILLS

- 3D Rendering
- Archiving
- Backup Systems
- Broadcast Workflow
- Business Intelligence Tools
- Cloud management/Computing
- Coding and Development
- CRM Systems
- Data Migration
- Digital Asset Management
- Fabric Attached Storage
- File Based Workflows
- Financial Systems
- Hierarchical Storage Management
- Integration Tools
- Media Asset Management
- Network Attached Storage
- Network Design/Architecture
- Networking (Wired and Wi-Fi)
- Networking Diagrams
- Project Documentation
- Storage Area Network
- Tape Libraries
- Virtual and Local Servers

CONTINUOUS IMPROVEMENT

- Leadership
- Process Improvement
- Quality improvement

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

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Mann, Urrutia, Nelson CPAS & Associates, LLP

Small Business ≤ $50,000

ET16-0127

Approval Date: July 21, 2015

ETP Regional Office: Sacramento **Analyst:** W. Sabah

CONTRACTOR

- Type of Industry: Services

  Priority Industry: ☐ Yes ☒ No
- Number of Full-Time Employees

  California: 44

  Worldwide: 44

  Number to be trained: 41

  Owner ☒ Yes ☐ No
- Out-of-State Competition: Competitors Outside CA
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 19%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $26,158
- In-Kind Contribution: $32,642

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement, Management Skills	41	8-60	0	$638	$16.00
				Weighted Avg: 29			

- Reimbursement Rate: Job #1: $22 SB Non-Priority
- County(ies): El Dorado, Placer, Sacramento, Los Angeles
- Occupations to be Trained: Administrative Staff, Production Staff, Production CPA Staff, Information Technology Staff, Manager Level 1, Manager Level 2, Owner
- Union Representation: ☐ Yes ☒ No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: Sierra Consulting Services in Cameron Park assisted with development for a flat fee of $2,507.
- Administrative Services: Sierra Consulting Services will also provide administration services for an amount not to exceed 13% payment earned.
- Training Vendors: N/A

OVERVIEW

Founded in 2003 and headquartered in Sacramento, Mann, Urrutia, Nelson CPAS & Associates, LLP (MUN CPAS) (www.muncpas.com) is a full service accounting and auditing firm. The Company offers tax, audit, bookkeeping, consulting, litigation support, business valuation, and forensic services. The Company has locations in Glendale, Roseville, Sacramento and South Lake Tahoe, and provides services to small and medium sized businesses throughout the state of California. MUN CPAS primarily serves physicians, dentists, business owners, construction and manufacturing companies, government entities, and non-profit organizations.

Need For Training

In the last few years, large out-of-state companies have been buying up small CPA practices in California, resulting in increased consolidation within the industry. These large companies are able to spread their costs over a larger revenue stream and MUN CPAS is unable to compete

against them on price. To remain competitive, MUN CPAS will train employees on customer service and negotiation skills. MUN CPAS is building a new client base in the dental industry, which will require training on specific dental industry tax and accounting issues. Other training will encompass general tax laws, R&D credits, The Affordable Healthcare Act, and trusts & estates.

MUN CPAS goals are to increase revenue, retain customers, improve work efficiency and enhance customer satisfaction at competitive prices. To meet these goals, the Company implemented a new Practice CS Software in January to operate at peak productivity with real-time dashboard access to firm, staff, and client information. In addition, the software has a client management section which will allow staff to coordinate all transactions and emails sent to clients for documentation. Employees will need training on the set-up and use of various reports of the Practice CS Software functions.

Training Plan

MUN CPAS will provide 8-60 hours of Class/Lab training delivered by in-house subject matter experts. Training will take place at the Company's locations in Glendale, Roseville, Sacramento and South Lake Tahoe.

Business Skills: Training will be offered to all occupations to improve customer service skills, enhance public speaking skills for project interviews with clients, and improve time management skills to increase efficiency in the workplace and reduce project delivery costs. Training will include Business Communication, Conflict Resolution, Communication Styles, Cost Control, Planning and Organizing, and Time Management.

Commercial Skills: Training will be offered to all occupations to improve technical skills in all aspects of tax, audit and accounting to provide high quality service to existing and new clients. Training will include Tax Planning Skills, Tax Credits, GAAP to Tax Adjustments, and Preparation/Review of Monthly, Quarterly, and Annual Estate Tax Returns.

Computer Skills: Training will be offered to all occupations to increase efficiency in MS Office Suite and to use technology to cut costs through automation of processes such as reporting, communication and analysis. Training will increase employee knowledge on the new Practice CS Software to improve management of existing clients and potential clients, manage projects, schedule and manage staff, and improve firm management through streamlined reporting and sharing of information. Training topics will include Client Relationship Management Software, Microsoft Office Suite (Intermediate/Advanced), QuickBooks and Practice CS Software.

Continuous Improvement: Training will be offered to all occupations on cross training to expand employee knowledge and skill sets in all areas of the business. Training will provide employees with the skills and confidence to interact and negotiate with existing clients, potential clients, peers, IRS and other regulatory agencies. Training will include Cross Training, Decision Making, Leadership Skills, Project Management, Strategic Planning and Teamwork Development Skills.

Management Skills: Training will be offered to Managers and Owners. Training will focus on enhancing the skills of Managers and Owners to create a productive and nurturing atmosphere to motivate and coach staff. Training will improve overall firm morale, staff development, and client service. Training will include Coaching Procedures, Effective Meeting for Leaders, Leadership, Motivation, Supervisor Skills and Teambuilding.

RECOMMENDATION

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum

Class/Lab Hours

8- 60 Trainees may receive any of the following:

BUSINESS SKILLS

- Business Communication
- Business Fundamentals
- Business Performance
- Business Writing
- Conflict Resolution
- Creative Marketing
- Customer Relationship Management
- Customer Service
- Communication styles
- Cost Control
- Dealing with Difficult People
- Financial Analysis
- Interpersonal Communications
- Leadership
- Marketing/Sales Techniques
- Negotiating
- Operational skills
- Planning and Organization
- Product Knowledge
- Project Management and Methodology
- Project Requirements Analysis and Specifications
- Property and Resource Management Skills
- Retaining Customers
- Relationship Building
- Sales
- Strategic Planning
- Successful Selling Techniques/Sales
- Time Management

COMMERCIAL SKILLS

- Preparation/Review of Individual Tax Returns
- Preparation/Review of S-Corporation Tax Returns
- Preparation/review of Partnership tax returns
- Preparation/review of Fiduciary and Estate Tax Returns
- Tax Planning Skills
- Industry Specific Training (Non-Profit, Medical Industry, Construction, service, government)
- Partnership Basis Issues
- S-Corporation Basis Issues
- Capitalization and Depreciation of Fixed Assets
- How to Conduct an IRS or State Tax Authority Examination
- How to Respond to a Tax Notice

- Preparation/Review of Monthly, Quarterly and Annual Payroll
- Preparation/Review of Forms 571-L
- Retirement Planning and Options
- Tax Credits
- GAAP to Tax Adjustments
- Accrual to Cash/Cash to Accrual Adjustments
- Preparation/Review of Monthly, Quarterly and Annual Estate Tax Returns
- Preparation/Review of Compiled and Reviewed Financial Statements

COMPUTER SKILLS

- Client Relationship Management Software
- Microsoft Office (Intermediate/Advanced)
- QuickBooks
- Practice CS Software

CONTINUOUS IMPROVEMENT

- Cross Training
- Decision Making
- How to Coach and Mentor
- Leadership skills for frontline workers
- Lean Procedures Practices
- Project Management
- Process Improvement
- Strategic Planning
- Teamwork Development Skills
- Time Management

MANAGEMENT SKILLS (Managers and Owners Only)

- Coaching
- Decision Making
- Effective Meetings for Leaders
- Finance for Technical Managers
- Essential Skills for New Supervisors
- Leadership
- Supervisor Skills
- Teambuilding

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

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Retrainee - Job Creation Training Proposal for:

Maas Energy Works, Inc. (AB118)

Small Business ≤ $50,000

ET16-0801

Approval Date: July 28, 2015

ETP Regional Office: Sacramento **Analyst:** M. Mazzone

CONTRACTOR

- Type of Industry: Biotechnology/Life Sciences
  Green Technology
  Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees
  California: 4
  Worldwide: 4
  Number to be trained: 10
  Owner ☒ Yes ☐ No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☒ Yes ☐ No
- Turnover Rate: 0%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $15,600
- In-Kind Contribution: $15,600

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, Commercial Skills, Computer Sills, PL - Commercial Skills	4	8-60	0-10	$1,560	$17.00
				Weighted Avg: 60			
2	Retrainee Job Creation Initiative SB<100 Priority Rate	Business Skills, Commercial Skills, Computer Sills, PL - Commercial Skills	6	8-60	0-10	$1,560	$17.00
				Weighted Avg: 60			

- Reimbursement Rate: Job #'s 1 & 2: $26 SB Priority
- County(ies): Kings, Fresno, Sacramento, Shasta, Tulare
- Occupations to be Trained: Project Manager, Biogas Facility Technician, Owner
- Union Representation: ☐ Yes ☒ No
- Health Benefits: N/A

SUBCONTRACTORS

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

OVERVIEW

Maas Energy Works, Inc. (Maas Energy) was founded in Redding in 2010. The Company works in partnership with California rural dairy farmers and specializes in the capture of methane gas and conversion of this gas into electricity. Maas Energy leases land from dairy farmers and constructs an anaerobic digester and biogas engine facility on-site at each dairy farm. The anaerobic digester allows Maas Energy to manage the process of turning cow manure into methane gas. Methane gas is then moved to the biogas facility where the biogas engine converts the methane gas into electricity.

Training in this proposal will take place at the Company's headquarters in Redding or at one of the sites that currently has a biogas renewable energy generation facility. Each facility consists of a biogas engine, biogas communication software terminal and electrical/gas controls. Currently, there are biogas facilities managed by Maas Energy in Galt, Elk Grove, Corcoran, Riverdale and Tipton. After the methane is converted into electrical energy, Maas Energy sells the energy to power utility companies such as PG&E and SMUD.

Need for Training

Maas Energy currently uses outside contractors to service and maintain the machinery that converts methane gas to electricity. Biogas engines differ from standard diesel and electrical engines and specialized training is required. Maas Energy's main training goal is to educate Biogas Facility Technicians in biogas engine operation, maintenance and troubleshooting. This will allow Maas Energy to keep this work in-house and eliminate the need to subcontract services. With proper training, Maas Energy technicians will manage all functions at each facility which include:

- Operating and maintaining the biogas engine;
- Processing information and using controls at the biogas computer terminal;
- Operating the facility's electrical and gas controls, and;
- Maintaining the anaerobic digester.

In addition, Project Managers will receive training to improve professional soft skills. Specifically, training will focus on the skills necessary to market, design, operate and manage biogas facilities.

Retrainee - Job Creation

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

In this proposal, Maas Energy has committed to hiring six new employees (Job Number 2). Maas Energy represents that the date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. The Company also represents that these trainees will be hired into "net new jobs" as a condition of contract.

Maas Energy is rapidly growing in California as they are expecting to double the number of dairy farm facilities they operate and one location is currently expanding. This growth is projected over the next two years. With this business growth and taking on duties currently outsourced, Maas Energy will need to hire new employees.

AB118

This proposal will be funded under the AB 118 Training Program that was created in FY 2009-10. The AB 118 Program is administered by ETP in partnership with the California Energy Commission (CEC).

The overall goal of the AB 118 Program is to support a transition from petroleum-based transportation to alternative and renewable fuels and clean, low carbon vehicle technologies. There is no expenditure of Employment Training Tax funds for the AB 118 Program. Public entity employers are eligible to participate, such as city and county regional transit authorities.

Training is focused on job skills for a skilled workforce to produce and distribute new alternative fuels and design, construct, install, operate, service and maintain new fueling infrastructure and vehicles.

Alternative Fuel is defined as any fuel other than the traditional selections, gasoline and diesel from petroleum sources, used to produce energy or power. Examples of alternative fuels are: bio-diesel, ethanol, methanol, electricity, propane, compressed or liquid natural gas, and hydrogen.

Training Plan

Maas Energy plans to train its staff using a combination of Classroom/Laboratory, Productive Lab (PL) and Computer-based training (CBT). The classroom/Laboratory training and CBT will build a base of knowledge, which PL training will further expand.

Business Skills: Training will be delivered to all occupations. The Biogas Facility Technicians will receive minimal business skills training. The majority of the Project Manager's training will focus on the Biogas facility design, implementation and management. Training topics will include: Biogas Project Financial Management, Biogas Project Management, Biogas Facility Design and Operation, Biogas Marketing, Technical Writing and Obtaining Air Permits.

Commercial Skills: Training will be delivered to all occupations. Project Managers will receive an overview in the Technician processes. Biogas Facility Technicians will receive in-depth training on the operation, maintenance and controls of Biogas equipment. Training topics will include: Welding, Biogas Engine Maintenance, Biogas Engine Control, Biogas Engine Troubleshooting, Biogas Facility Electrical, Biogas Facility/Engine Safety and Utility Interconnection.

Computer Skills: Training will be delivered to all occupations to improve knowledge of the Biogas Facility Communications Networking system. All staff will have the ability to use this system productively after training.

Productive Lab (PL) – Commercial Skills

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

PL training will be crucial to Maas Energy's success as the Company plans to take on the duties currently outsourced. Duties including Biogas engine operation, Biogas engine maintenance and Biogas engine troubleshooting are all outsourced to contractors. Biogas Facility Technicians will receive class/lab and/or CBT training to lay a foundation of knowledge regarding Biogas engines. Trainers will observe and coach trainees prior to sending the trainee off to perform the work on their own. The Biogas engine repairs and maintenance are very detailed and time consuming tasks, which require extensive hands on training.

The PL training will provide staff with the hands on experience necessary to develop competency in the tasks. The Biogas Facility Technicians may receive up to 60 hours of PL training and the trainer-to-trainee ratio will not exceed 1:3. A 1:3 may be necessary as the worksites are spread throughout the state and it would be more cost efficient to bring the trainees and the trainer to one location for training.

RECOMMENDATION

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum

Class/Lab Hours

8-60

Trainees may receive any of the following:

BUSINESS SKILLS

- Biogas Project Financial Management
- Biogas Project Management
- Biogas Facility Design and Operation
- Technical Writing
- Biogas Marketing
- Obtaining Air Permits

COMMERCIAL SKILLS

- Welding
- Biogas Engine Maintenance
- Biogas Engine Controls
- Biogas Engine Troubleshooting
- Biogas Facility Electrical
- Biogas Facility / Engine Safety
- Utility Interconnection

COMPUTER SKILLS

- Biogas Facility Communications Networking

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

Productive Lab Hours

0-60

COMMERCIAL SKILLS (Ratio 1:3)

- Welding
- Biogas Engine Maintenance
- Biogas Engine Controls
- Biogas Facility Electrical
- Biogas Engine Troubleshooting

CBT Hours

0-10

COMMERCIAL SKILLS

- Basic Electric Circuits (5 hours)
- Basic Anaerobic Chemistry (5 hours)

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

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Retrainee - Job Creation Training Proposal for:

MBK Enterprises, Inc. dba MBK Tape Solutions

Small Business ≤ $50,000

ET16-0134

Approval Date: July 20, 2015

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

CONTRACTOR

- Type of Industry: Manufacturing
  Services
  Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees
  California: 40
  Worldwide: 41
  Number to be trained: 45
  Owner ☒ Yes ☐ No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☒ Yes ☐ No
- Turnover Rate: 9%
- Repeat Contractor: ☒ Yes ☐ No

FUNDING

- Requested Amount: $49,920
- In-Kind Contribution: $52,377

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 Priority Rate	Business Skills, Computer Skills, Continuous Improvement, Mfg. Skills	40	8-200	0	$1,118	$15.97
				Weighted Avg: 43			
2	Job Creation Initiative SB < 100 Priority Rate	Business Skills, Computer Skills, Continuous Improvement, Mfg. Skills	5	8-200	0	$1,040	$13.31
				Weighted Avg: 40			

- Reimbursement Rate: Job #'s 1 & 2: $26 SB Priority
- County(ies): Los Angeles
- Occupations to be Trained: Administrative Staff, Production Staff, Sales Staff, Manager/Supervisor, Owner
- Union Representation: ☐ Yes ☒ No
- Health Benefits: Job #'s1 & 2: $1.01 per hour

SUBCONTRACTORS

- Development Services: Training Funding source (TFS) in Seal Beach assisted in the development of this application for a flat fee of $2,900.
- Administrative Services: TFS will also provide administrative services for an amount not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

OVERVIEW

Founded in 1971, MBK Enterprises, Inc. dba MBK Tape Solutions (MBK) (www.mbktape.com), located in Chatsworth (City of Los Angeles), is a custom adhesive tape, foam, film and flexible material manufacturer. Its client base includes the aerospace, construction, electrical, hospitality, graphic arts, and healthcare industries. This is MBK's second ETP Agreement.

Designers and engineers in the adhesive and tape industry constantly develop new products such as two-part, low-odor, or high-bond adhesives in various forms for different applications. To keep up with the emerging competition, MBK recently developed several direct food contact tape products that comply with FDA safety regulations. These products will be used for manufacturing, processing and packaging food, dental, and pharmaceutical products. One of MBK's new product lines includes tapes and components for wearable sensor devices used to diagnose and monitor diseases, fitness, and general patient wellness.
To keep up with product line expansions, MBK purchased two new machines, and is in the

process of purchasing a third one. MBK also installed a new structural work platform to expand the production area, which allows for increased inventory capacity. With new products, machines, and infrastructure improvements, MBK's goal is to double annual sales in the next five years while maintaining quality. As the Company grows, training is crucial for staff to remain effective, while reducing costs and waste.

Retrainee - Job Creation

To reach the sales and product line expansion goals stated above, MBK will require additional Administrative, Production, and Sales employees. In support of job creation, the Panel is offering incentives to companies that commit to hiring new employees. Trainees will be subject to a lower post-retention wage. MBK has committed to hiring five new employees (Job Number 2). The date-of-hire for all trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

Training Plan

Business Skills (20%) – Training will be offered to all staff to increase communication, and conflict resolution skills, while Team Development will help employees receive the skills needed to excel in the dynamics of sales growth. Sales Staff will need training in Product Data, and Sales Management to properly communicate product value and services that MBK offers. With the upsurge in sales, the escalation of workload has increased the need for Development and Leadership Skills. Supervisors will learn to properly communicate with Production Staff, and address issues as they arise. Training in Organizational and Time Management will give employees the resources of effective customer relationship management (CRM) documentation and input.

Computer Skills (20%) – Training will be provided to all staff to effectively utilize aspects of the CRM and Enterprise Resource Planning software. The new phase of software training will focus on processing reports, logging and closing sales leads, and converting inquiries to orders, necessary for the increased volume of orders and customers. Continuous training for Query Report Writer is needed to create statistical reports integrated with the accounting software. AutoCAD LT 2015 was purchased this year, and MBK needs more employees to be proficient in CAD to help avoid any bottlenecks with multiple drawings. Label Matrix Barcode training will help identify inventory and warehouse layouts.

Continuous Improvement (20%) – Training will be provided to all staff to increase sales. Critical Thinking will increase all aspects of the business by working smarter and more efficiently. Quality Management Systems and Process Performance Measures are necessary for the ISO 9001:2008 standard, and for customer satisfaction.

Manufacturing Skills (30%) – Training will be offered to Production Staff to provide adequate cross-training on equipment operations, and integrate new equipment and products for efficient workflow. With the new machine additions, it is important that Operational Planning and Processes, and Best Production Methods are being utilized to use new machines to their fullest potentials. Reliability Centered Maintenance ensures precise maintenance techniques at proper intervals. With the addition of the new production mezzanine level, Warehouse Management, and Workplace Organization/5S are essential to allow for the growth in manufacturing, efficient inventory control, and Supply Chain Management. Lean Thinking Practices need to be in the forefront of all employees to make sure sales goals are achieved.

High Unemployment Area

The 45 trainees in Job Numbers 1 and 2 work in a High Unemployment Area (HUA), a region with unemployment exceeding the state average by at least 25%. The Company's location in Los Angeles qualifies for HUA status under these standards. However, MBK is not asking for a wage modification.

Part-Time to Full-Time Employment

Some of the trainees, both incumbent workers and Job Creation, will be employed on a part-time basis during the start of training. MBK is aware that retention and post-retention wage requirements cannot be satisfied until the trainees have been placed into a full-time permanent position, and progress payments cannot be invoiced until then.

Modifications

Training Hours Limitation

According to MBK, Managers and key Sales Staff will need up to 200 hours of training, given the robust sales objectives. The remaining trainees will receive an average of 40-50 hours of training across all training topics.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET13-0380	Los Angeles	5/10/13-5/9/15	$48,360	TBD

MBK trained 32 ETP eligible trainees; all of them have completed their 90-day retention and are currently in review. MBK's projected earning is 100% of the funding amount.

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

BUSINESS SKILLS

- Communication Strategies
- Conflict Resolution
- Customer Service Excellence
- Financial Analysis
- Inventory Management System
- Leadership and Team Development
- Management Skills for New Managers
- Organizational and Time Management
- Preparing for Leadership
- Product Data Management
- Sales Management
- Strategic Marketing

COMPUTER SKILLS

- AutoCAD LT v. 2015
- CRM
- ERP
- Label Matrix Barcode
- Microsoft Office
- Query Report Writer
- QuickBooks
- UPS/FEDX Supply Chain

CONTINUOUS IMPROVEMENT

- Critical Thinking
- Document Management
- Error Proofing Business Practices
- Process Performance Measures
- Quality Management Systems

MANUFACTURING SKILLS

- Best Production Methods
- Lean Thinking Practices
- Operational Planning and Processes
- Production Machinery
- Reliability Centered Maintenance (RCM)
- Supply Chain Management
- Warehouse Management
- Workplace Organization/5S

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:

Monster City Studios

Small Business ≤ $50,000

ET16-0160

Approval Date: August 18, 2015

ETP Regional Office: Sacramento **Analyst:** L. Fraizer

CONTRACTOR

- Type of Industry: Manufacturing

  Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees

  California: 12

  Worldwide: 12

  Number to be trained: 14

  Owner ☒ Yes ☐ No
- Out-of-State Competition: Competitors Outside CA
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☒ Yes ☐ No
- Turnover Rate: 10%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $15,600
- In-Kind Contribution: $16,000

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate HUA SB<100	Business Skills, Computer Skills, Cont. Imp., Hazardous Mat., Mfg. Skills, PL-Mfg. Skills	12	8-60	0	$1,040	$11.30
				Weighted Avg: 40			
2	Job Creation Initiative HUA Priority Rate SB<100	Business Skills, Computer Skills, Cont. Imp., Hazardous Mat., Mfg. Skills, PL-Mfg. Skills	2	8-60	0	$1,560	*$9.25
				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 statewide minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table.

- Reimbursement Rate: Job #'s 1 & 2: $26 SB Priority
- County(ies): Fresno
- Occupations to be Trained: Manufacturing/Fabrication Staff, Administrative Staff, Artist, Owner
- Union Representation: ☐ Yes ☒ No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: Strategic Business Solutions, LLC in Visalia assisted with the development of this project for a flat fee of $1,090.
- Administrative Services: Strategic Business Solutions, LLC will also provide administrative services for a fee not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

INTRODUCTION

Founded in 2012 and located in Fresno, Monster City Studios (monstercitystudios.com) is a corporation that manufactures and fabricates theme-based environments. The Company uses cutting-edge technology in foam, clay and other materials to make 3D facades, sets and characters. Customers are in the entertainment industry and commercial markets such as restaurants.

Need for Training

Over the last two years, Monster City Studios has expanded to meet industry demands from metropolitan areas such as Los Angeles. The Company competes strongly in the market due to the lower overhead available in the Central Valley.

The Company recently invested in new equipment and developed a business plan to provide a flexible, high performance workplace. In particular, Monster City Studios purchased a new CNC/Lathe machine and software for the art and administration departments. The CNC/Lathe machine uses computer controls to cut and shape different materials, and the software programs are used for 3D Sculpting, modeling and graphics.

Training will allow Monster City Studios to reach greater efficiencies, improve business skills and enhance customer satisfaction. To achieve these goals, the Company must improve processes and procedures while developing trainee skills through formal training. Training will help Monster City Studios gain an advantage over their competition while fostering growth of the business.

Retrainee - Job Creation

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

In this proposal, Monster City Studios has committed to hiring 2 new employees (Job Number 2). Monster City Studios represents that the date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. The Company also represents that these trainees will be hired into “net new jobs” as a condition of contract.

The Company is projecting 15% - 20% growth and is hiring staff to meet customer and industry demand. The Company is increasing their production capacity due to the purchase of new machinery. Monster City Studios has invested in a new CNC Lathe machine, new ZBrush software and 3D software. These new workers will require ample training to develop the requisite skills to become proficient in the new equipment and facilitate this anticipated growth.

Training Plan

Trainees will receive up to 60 hours of Class/Lab and up to 10 hours of Productive Lab (PL) in the following:

Business Skills: Training will be offered to all occupations to improve communication skills, increase proficiency and improve productivity. Training will include Accounting and Cash Flow Principals, Customer Service Skills and Developing Project Management/Strategic Planning. Training will support the Company’s growth strategies to increase sales and improve customer service.

Computer Skills: Training will be provided to all occupations and focus on job specific software programs. The entertainment industry is constantly transitioning to the most advanced tools and staff needs training in all necessary software programs to ensure expertise. Training topics include Photoshop/Illistrator Software, ZBrush Software and Frog 3D Software, Microsoft Office and Quickbooks.

Continuous Improvement: Training will be offered to all occupations to maintain quality, improve efficiency and reduce waste. Training includes Lean Manufacturing, Process Improvement, Strategic Planning and Quality Control Principles. Training will provide the skills to analyze and improve production processes, solve problems, and implement sustainable processes.

Hazardous Materials: Training will be provided to Artists and Manufacturing/Fabrication Staff to ensure that hazardous materials are handled and disposed of properly. Training topics will include Proper Disposal, Emergency Clean-Up, and Application, Handling, Labeling and Storage of Chemical Substances.

Manufacturing Skills: Training will be offered to Artisits, the Owner and Manufacturing and Fabrication Staff. Training topics will include Computer assisted Machinery Operation (Frog Mill CNC Lathe), Foam Molding/Sculpting, Mathews Paint System Operation/Setup and Repertory Protection and Equipment. Training will focus on upgrading trainee skills, improving efficiency and increasing production to reduce lead times and waste.

Productive Laboratory-Manufacturing Skills

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

Up to 10 hours of PL training will be provided to Artists and Manufacturing/Fabrication Staff to supplement Class/Lab training. PL training is necessary to strengthen skills to produce life scale facades and figures. Training will focus on the set-up, safe operation, cleaning and resetting calibration functions of the Frog Mill CNC/Lathe Machine. During the PL training the trainer-to-trainee ratio will not exceed 1:2.

High Unemployment Area Modification

All trainees work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%. For these trainees, the Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages.

The Company's location in Fresno County qualifies for HUA status under these standards. Monster City Studios is requesting a wage modification to $11.30 per hour in Job Number 1, and a wage modification to $9.25 per hour for Job Number 2.

RECOMMENDATION

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum

Class/Lab Hours

8-60 Trainees may receive any of the following:

BUSINESS SKILLS
- Accounting and Cash Flow Principles
- Customer Service Skills
- Project Management/Strategic Planning

COMPUTER SKILLS
- QuickBooks Software Training
- Microsoft Office Suite Training
- Frog 3D Software Training
- Photoshop/Illustrator Software Training
- ZBrush Software Training

CONTINUOUS IMPROVEMENT
- Quality Control Principles
- Teambuilding/Leadership
- Time Management
- Process Analysis Principles and Tools

HAZARDOUS MATERIALS
- Labeling
- Handling
- Storage and Disposal

MANUFACTURING SKILLS
- Computer-Assisted Machinery Operation (Frog Mill CNC/Lathe)
- Foam Molding/Sculpting
- Clay Maquette Molding/Sculpting
- Mathews Paint System Operation and Setup
- Materials Handling Equipment Training
- Height Training/Fall Protection
- Respiratory Protection and Equipment

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

Productive Lab Hours

0-10

MANUFACTURING SKILLS (Ratio 1:2)
- Computer-Assisted Machinery Operation (CNC/Lathe)
  - Set-Up & Calibration
  - Programming
  - Fabrication
  - Finish Procedures

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery. PL is capped at 10 hours per-trainee.

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Platinum Engineering Solution Inc.

Small Business ≤ $50,000

ET16-0126

Approval Date: July 20, 2015

ETP Regional Office: Sacramento **Analyst:** M. Mazzone

CONTRACTOR

- Type of Industry: Engineering

  Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees

  California: 11

  Worldwide: 11

  Number to be trained: 11

  Owner ☒ Yes ☐ No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☒ Yes ☐ No
- Turnover Rate: 10%
- Repeat Contractor: ☒ Yes ☐ No

FUNDING

- Requested Amount: $8,294
- In-Kind Contribution: $4,800

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, Mgmt Skills	11	8-60	0	$754	$15.07
				Weighted Avg: 29			

- Reimbursement Rate: $26 SB Priority
- County(ies): Madera, Kern
- Occupations to be Trained: Executive Assistant. Lead Designer, Designer, Engineer, Manager, Marketing Representative, Owner
- Union Representation: ☐ Yes ☒ No
- Health Benefits: $1.44 per hour

SUBCONTRACTORS

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

INTRODUCTION

Founded in 2001, Platinum Engineering Solution Inc. (Platinum Engineering) is located in Madera and has a satellite office in Bakersfield. The Company is a structural engineering firm that designs and analyzes different types of structures (e.g. multiple story buildings, tract homes, industrial and commercial buildings, and communication towers). Its expertise includes different types of materials including steel, wood, and concrete. The Company provides services to a wide range of clients, from home owners and developers to large corporations such as McDonald's, Starbucks and Verizon.

PROJECT DETAILS

Platinum Engineering faces competition from other engineering firms, both local and out-of-state. To remain competitive, Platinum Engineering must keep its staff up-to-date on industry codes and technology. Computer Skills training will allow trainees to provide modern, cost-efficient, and safe structural designs. Commercial Skills training will lead toward Leadership in Energy and Environmental Design (LEED) certification. LEED certification will allow Platinum Engineering to take on projects that focus on "green" construction. Continuous Improvement and Business Skills training will improve internal processes and communication skills.

Training Plan

This will be the fifth ETP-funded Agreement for Platinum Engineering. Although the Curriculum is similar to previous contracts, trainees will not receive a repeat of the same training provided in the previous ETP-funded projects. Training in this proposal will focus on further improving and fine tuning design and engineering skills.

Business Skills – All occupations will receive training in topics relating to their specific job duties. Topics include leadership, marketing/sales techniques, negotiations, project management, and strategic planning. This training will assist the Company in expanding existing relationships to create new business as well as providing effective communication and efficient responses to customer needs.

Commercial Skills - Lead Designer, Designer, and Engineers will receive training in topics which include LEED design, US green building best practices, technical writing, and energy and environmental design for green building. Commercial skills will enable more efficient production and cost savings.

Computer Skills - All occupations will receive training in topics relating to their specific job duties. These topics include Microsoft Office, Finite Analysis software, RISA-3D, RISA-Tower, and Nonlinear Analysis software. Training will enable the Company to meet customer demand, respond quickly and accurately, and increase delivery integrity.

Continuous Improvement – All occupations will receive training in Root Cause Analysis, Process Improvement, Time Management, Decision Making, and Systems Failure Analysis. Training will enable the Company to eliminate waste in processes while improving operating costs, reliability, quality, and customer satisfaction.

Management Skills – The Manager and Owner will receive training in Effective Meetings for Leaders, Finance for Technical Managers, Leadership Skills and Team Building. Training will foster higher productivity by improving management and coaching skills.

High Unemployment Area

All trainees work in a high unemployment area exceeding the state average by at least 25%. However, Platinum Engineering is not asking for a wage modification.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
*ET15-0132	Madera	07/07/14 – 07/06/15	$8,320	$0 (0%)

ET14-0116	Madera	7/31/13-7/30/14	$8,320	$8,320 (100%)
**ET12-0415	Madera	6/12/12-6/11/13	$8,320	$5,109 (61%)
ET11-0159	Madera	1/6/11-1/5/12	$8,320	$7,735 (93%)

***ET15-0132** – Platinum Engineering has not yet submitted a final invoice for this contract, however the Company is expecting to earn 100% of the contract amount. The ETP website shows that a total of 505 reimbursable training hours have been entered. At 100%, Platinum Engineering only requires a total of 320 reimbursable training hours. All trainees are expected to complete the 90 day retention and meet the ETP post-retention wage requirements.

****ET12-0415** – Platinum Engineering earned 61% of the of the total Agreement amount. The Contractor delivered the training to all trainees under the proposal. However, the Contractor miscalculated the wages of one trainee during retention which caused the trainee to not be eligible. Hence, performance fell under 70% without the trainee's training hours. The Contractor rectified the wages and the trainee received training under the next Agreement with earned funds.

Exhibit B: Menu Curriculum

Class/Lab Hours

8-60 Trainees may receive any of the following:

BUSINESS SKILLS

- Leadership Skills
- Marketing / Sales Techniques
- Negotiation Skills
- Project Management Skills
- Project Management Skills / Strategic Planning
- Strategic Planning

COMMERCIAL SKILLS

- Project Management
- Team Building and Problem Solving Skills
- Interpreting Data and Report Generation
- LEED Design Skills
- US Green Building Best Practices
- Technical Writing
- Energy and Environmental Design for Green Building
- Engineer Theory / Planning / Design
- Retaining Wall Design

COMPUTER SKILLS

- Computer Aided Drafting (CAD)
    - CAD Standards
    - CAD Software
- Intermediate and Advanced Microsoft Office
- Autodesk AutoCAD
- Finite Analysis Software
- Quick Books
- RISA-3D
- RISA-Tower
- Foundation Aid Programs
- Nonlinear Analysis Software
- 3D Modeling / Autodesk / Sketch Up

CONTINUOUS IMPROVEMENT

- Time Management
- Problem Solving
- Decision Making
- Root Cause Analysis
- Systems Failure Analysis
- Process Improvement

MANAGEMENT SKILLS (Manager and Owner Only)

- Effective Meetings for Leaders
- Finance for Technical Managers
- Leadership Skills
- Team Building Skills

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

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery.

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Retrainee - Job Creation Training Proposal for:

R.S.S.E., Inc.

Small Business ≤ $50,000

ET16-0138

Approval Date: August 4, 2015

ETP Regional Office: Sacramento **Analyst:** W. Sabah

CONTRACTOR

- Type of Industry: Services

  Priority Industry: ☐ Yes ☒ No
- Number of Full-Time Employees

  California: 10

  Worldwide: 10

  Number to be trained: 13

  Owner ☒ Yes ☐ No
- Out-of-State Competition: No OSC
- Special Employment Training (SET): ☒ Yes ☐ No
- High Unemployment Area (HUA): ☒ Yes ☐ No
- Turnover Rate: 1%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $12,760
- In-Kind Contribution: $15,000

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 impr	10	8-60	0	$880	$13.75
				Weighted Avg: 40			
2	Retrainee Job Creation SB <100 SET	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, PL-Comm Skills	3	8-60	0	$1,320	$14.00
				Weighted Avg: 60			

- Reimbursement Rate: Job #'s 1 and 2: $22 SB Non-Priority
- County(ies): Shasta
- Occupations to be Trained: Service Technician, Administration Staff, Sales Staff, Owner
- Union Representation: ☐ Yes ☒ No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: Strategic Business Solutions, LLC in Visalia assisted with development for a flat fee of $900.
- Administrative Services: Strategic Business Solutions, LLC will also provide administrative services for an amount not to exceed 13% of amount earned.
- Training Vendors: To Be Determined

OVERVIEW

R.S.S.E., Inc. (RSSE) (www.rsse.biz), located in Redding, has been supplying equipment to engineering & 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. Additionally, the Company provides compliance testing for all fuel dispensing operations. The Company's customer base includes service stations, convenience stores, truck stops, airports, municipalities, auto repair shops, and other commercial entities.

Need For Training

The addition of Radio Frequency Identification (RFID) chips in credit and debit cards requires upgrades to point of sale systems from the fuel pumps to the cash register. RFID technology uses computer chips to track the cards used by consumers. Training is required for installation, troubleshooting, and repair of various fuel dispensing systems including service equipment such as air compressors and hydraulic vehicle lifts.

Additionally, RSSE's staff requires training on the newly purchased S2K by Davis ware. This fully integrated computer software will upgrade all internal systems and allow staff to manage inventory with serial number lookups, schedule equipment maintenance by customers, dispatch/schedule technicians, access customer equipment history, and complete accounting functions including other internal management functions. Training will allow staff to improve customer service, increase efficiency and stay current on updated standard operating procedures, accounting skills and computer software skills.

Retrainee - Job Creation

In support of job creation, the Panel is offering incentives to companies that commit to hiring new employees. Training for newly-hired employees will be subject to a lower post-retention wage.

RSSE will expand its current business capacity. The Company is experiencing steadily increasing sales. In order to meet demand and provide outstanding customer service, the Company will hire 3 Service Technicians (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

Business Skills - Training will be offered to all occupations on Account Development and Job Estimating Skills. Training will allow employees to effectively communicate with customers, improve customer satisfaction, acquire new business and provide accurate job estimates.

Commercial Skills - Training will be offered to Service Technicians, Sales Staff and Owners. Training will focus on operating, installing, troubleshooting, and repairing various fuel dispensing systems and proper handling of trenchers, bobcats and backhoes.

Computer Skills - Training will be offered to all occupations on Davis ware S2K Software, QuickBooks, and EMV Software system. Training will allow employees to efficiently manage inventory, schedule equipment maintenance, and improve control processes. Additionally, training will allow trainees to accurately integrate Davis ware S2K software and QuickBooks to improve internal accounting functions.

Continuous Improvement - Training will be offered to all occupations to improve efficiencies and reduce waste. Training will focus on process analysis, job staging, work processes and inventory control to provide trainees with the skills to recognize and recommend changes to improve internal processes.

Productive Lab - Commercial Skills

Productive Lab (PL) training will be provided to new hire Service Technicians to supplement Class/Lab training. This training will strengthen their understanding of how to properly use the excavation and trenching equipment in hazardous environments. Training on basic controls and simulated practice can be performed in class/lab environments; however, PL training is required on jobsites to increase proficiency and insure a safe work environment.

Trainees will use trenchers, bobcats and backhoes during PL training. PL will take place at job sites. The trainer-to-trainee ratio for all training will not exceed 1:1. Each trainee will receive up to 10 hours of PL. Advanced certified trainers will provide constant supervision and direction while trainees complete the proper process of equipment handling. The trainer will offer coaching and mentoring throughout. Once a trainee can perform all tasks repetitively at production pace, the trainer will certify competency.

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.

However, 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 $13.75 per hour (9% below the Standard Minimum Wage) to train 10 trainees in Job Number 1. Job Number 2 (Job Creation) will not need a modification as they qualify for the New Hire Standard Minimum Wage.

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

- Account Development
- Job Estimating Skills

COMMERCIAL SKILLS

- Fuel Dispensing and Service Equipment Installation and Repair
- Excavation and Trenching Equipment
- Forklift Training
- Confined Space

COMPUTER SKILLS

- Davis ware S2K Software
- Quickbooks
- EMV Software System

CONTINUOUS IMPROVEMENT

- LEAN Processes

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

Productive Lab

0-10

COMMERCIAL SKILLS (trainer-to-trainee ratio not to exceed 1:1)

- Excavation and Trenching Equipment

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery. PL is capped at 10 hours per-trainee.

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

School Innovations & Achievement

Small Business ≤ $50,000

ET16-0136

Approval Date: July 30, 2015

ETP Regional Office: Sacramento **Analyst:** M. Jones

CONTRACTOR

- Type of Industry: Manufacturing

  Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees

  California: 92

  Worldwide: 92

  Number to be trained: 77

  Owner ☐ Yes ☒ No
- Out-of-State Competition: Competitors Outside CA
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 13%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $48,048
- In-Kind Contribution: $54,127

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate SB <100	Business Skills, Computer Skills, Continuous Improvement, Management Skills	77	8 - 60	0	$624	$16.13
				Weighted Avg: 24			

- Reimbursement Rate: Job #1: $26 SB Priority
- County(ies): El Dorado, Shasta, Los Angeles
- Occupations to be Trained: Administrative Staff, Customer Service Representative, Information Technology Staff, Manager, Sales Staff, Processing Staff, Program Advisor
- Union Representation: ☐ Yes ☒ No
- Health Benefits: Job #1: $2.79 per hour

SUBCONTRACTORS

- Development Services: Sierra Consulting Services in Cameron Park will develop this proposal for a flat fee of $4,704.
- Administrative Services: Sierra Consulting Services will also administer for a fee not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

OVERVIEW

Founded in 2003, School Innovations & Achievements (SIA) (www.sia-us.com) is a software developer that provides custom software solutions for schools. With locations in El Dorado Hills, Redding, and Pasadena, SIA has grown from the back-office facilitator for most of California's school districts and county offices of education, into the creator of unparalleled software solutions, most notably "Attention2Attendance" a software solution that decreases school absenteeism for school districts in California and Texas.

SIA will provide training to their El Dorado, Shasta and Los Angeles locations.

Need for Training

SIA has developed two new software programs; Partnering for Student Success and DataROBOT. Partnering for Student Success identifies students with mild to moderate special

education services needs, reducing the number of referrals for students to special education. DataROBOT is a data extraction tool that secures and automates data retrieval from the school's Student Information System. It is a tool that eliminates the need for district and school site infrastructures to support aggregating complex student data, consolidating lists, maintaining servers and internet connections.

With these newly developed software programs, SIA is expanding its business capacity by adding, and marketing to new clients throughout the United States. This will require more training for the Sales and Marketing departments as well as the Customer Service Call Center.

SIA also purchased two tracking modules; TimeAttend and WebExpense. With the implementation of these modules SIA will be able track employee hours, employee benefit accruals, electronic timesheets, expense sheets; upload receipts; provide mobile accessibility; and integrate with payroll. This will enable more efficient reporting and communication between all three SIA locations.

Training Plan

SIA will provide 8 – 60 hours of Class/Lab, Videoconferencing and E-Learning training in the following:

Business Skills - Training will be offered to all occupations to improve efficiency in the workplace, customer service skills and marketing skills to identify and secure new clients. Training topics will include Business Communication, Creative Marketing, Dialogue Skills and Planning and Organization.

Management Skills - Training will be offered to Managers to improve leadership skills and to effectively provide motivation to increase productivity. Training topics will include Coaching Procedures, Leadership and Motivation.

Computer Skills – Training will be offered to Administrative Staff, Customer Service Representatives, Information Technology Staff, and Processing Staff to improve productivity, enhance customer products and Information Technology development. Training topics will include Development Software, Marketing and Sales Tracking Software.

Continuous Improvement – Training will be offered to all occupations to improve decision making skills, process validations, quality assurance and problem solving. Training topics will include Decision Making, Process Improvement, Quality Measurement Systems and Time Management.

RECOMMENDATION

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 60 Trainees may receive any of the following:

BUSINESS SKILLS

- Business Communication
- Business Fundamentals
- Business Writing
- Behavior Style Strategies
- Conflict Resolution
- Creative Marketing
- Customer Relationship Management
- Customer Service
- Cost Control
- Dealing with Difficult People
- Dialogue Skills
- Essential Skills for the New Supervisor
- Interpersonal Communications
- Leadership
- Marketing/Sales Technique
- Negotiating
- Operational Skills
- Planning and Organization
- Presentation Skills
- Product Knowledge
- Project Management and Methodology
- Project Requirements Analysis and Specifications
- Property and Resource Management Skills
- Retaining Customers
- Relationship Building
- Sales Lead Generation
- Sales Opportunity Management
- Sales Delivery Methods
- Strategic Planning
- Successful Selling Techniques/Sales
- Time Management

COMPUTER SKILLS

- Autodesk/AutoCAD
- Client Relationship Management Software
- Crystal Reports
- Development Software
- Financial Management System
- IT Support Tracking System
- Marketing and Sales Tracking Software
- Microsoft Visual Studio (Team Foundation System)

- Microsoft Office (Intermediate and Advanced)
- Network & Database Admin Software
- QuickBooks
- SQL Server (Management Studio)

CONTINUOUS IMPROVEMENT

- Cross Training
- Communication Skills
- Creating a Quality Organization
- Change Management
- How to Coach and Mentor
- IT Support Technician Skills
- Leadership/Coaching
- Lean Procedures Practices
- Meeting Management
- Production Scheduling
- Production Operations/Workflow
- Process Improvement
- Product Management
- Project Management
- Problem Solving and Decision Making
- Process Capability
- Quality Measurement Systems
- Statistical Process Control
- Systems Failure Analysis
- Team Building
- Teamwork Development Skills
- Time Management

MANAGEMENT SKILLS (Managers Only)

- Decision Making
- Effective Meetings for Leaders
- Leadership
- Motivation
- Supervisor Skills
- Team Building

E-Learning Hours

8 - 60

BUSINESS SKILLS

- Business Communication
- Business Fundamentals
- Business Writing
- Behavior Style Strategies
- Conflict Resolution
- Creative Marketing

- Customer Relationship Management
- Customer Service
- Cost Control
- Dealing with Difficult People
- Dialogue Skills
- Essential Skills for the New Supervisor
- Interpersonal Communications
- Leadership
- Marketing/Sales Technique
- Negotiating
- Operational Skills
- Planning and Organization
- Presentation Skills
- Product Knowledge
- Project Management and Methodology
- Project Requirements Analysis and Specifications
- Property and Resource Management Skills
- Retaining Customers
- Relationship Building
- Sales Lead Generation
- Sales Opportunity Management
- Sales Delivery Methods
- Strategic Planning
- Successful Selling Techniques/Sales
- Time Management

COMPUTER SKILLS

- Autodesk/AutoCAD
- Client Relationship Management Software
- Crystal Reports
- Development Software
- Financial Management System
- IT Support Tracking System
- Marketing and Sales Tracking Software
- Microsoft Visual Studio (Team Foundation System)
- Microsoft Office (Intermediate and Advanced)
- Network & Database Admin Software
- QuickBooks
- SQL Server (Management Studio)

CONTINUOUS IMPROVEMENT

- Cross Training
- Communication Skills
- Creating a Quality Organization
- Change Management
- How to Coach and Mentor
- IT Support Technician Skills
- Leadership/Coaching
- Lean Procedures Practices

- Production Scheduling
- Production Operations/Workflow
- Process Improvement
- Product Management
- Project Management
- Problem Solving and Decision Making
- Process Capability
- Quality Measurement Systems
- Statistical Process Control
- Systems Failure Analysis
- Team Building
- Teamwork Development Skills
- Time Management

MANAGEMENT SKILLS (Managers Only)

- Decision Making
- Effective Meetings for Leaders
- Leadership
- Motivation
- Supervisor Skills
- Team Building

Note: Reimbursement for training is capped at 60 total training hours per trainee, regardless of the method of delivery.

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Source One Cable Technology, Inc.

Small Business ≤ $50,000

ET16-0121

Approval Date: July 21, 2015

ETP Regional Office: San Francisco Bay Area **Analyst:** R. Jackson

CONTRACTOR

- Type of Industry: Manufacturing
  Engineering
  Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees
  California: 73
  Worldwide: 74
  Number to be trained: 54
  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: $49,140
- In-Kind Contribution: $44,337

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 Priority Rate	Business Skills, Computer Skills, Continuous Improvement, Management Skills, Manufacturing Skills, OSHA 10/30, Literacy Skills	54	8-60	0	$910	$16.44
				Weighted Avg: 35			

- Reimbursement Rate: Job #1: $26 SB Priority
- County(ies): Santa Clara
- Occupations to be Trained: Production Staff, Administrative Staff, Management Staff, Engineers, Office Staff
- Union Representation: ☐ Yes ☒ No
- Health Benefits: Job #1: $2.43 per hour

SUBCONTRACTORS

- Development Services: Manex Consulting in San Ramon assisted with development of this project for a flat fee of $4,750 under an existing ETP Marketing Agreement.
- Administrative Services: None
- Training Vendors: To Be Determined

OVERVIEW

Source One Cable Technology, Inc. (SOCT) is a small business headquartered in San Jose, California with production facilities in US and Mexico. SOCT was started in 1991 and is now ISO certified and FDA registered. The Company specializes in custom development and production of electronic/mechanical cables and assemblies. SOCT serves broad industries worldwide including: medical, entertainment, transportation, and aerospace. Some of their better known customers include: Johnson & Johnson, Medtronic, Abbott, and the U.S. Government.

Following changes in leadership in 2014, the Company moved to its present location in San Jose from Los Gatos. SOCT has 74 full-time employees, 54 of which have been identified as needing skill upgrades in order to meet new contract demands and quality improvement/ performance goals. The Company conducted a comprehensive training needs assessment which consisted of customer feedback and internal performance appraisals, in order to set

specific training goals. These are: improved on-time delivery rates, increased sales, increased efficiency, waste reduction, and targeted cross-training needs. To this end, SOCT has implemented a companywide training initiative called Source One Fundamentals.

The proposed training plan aims to increase product delivery speed by an estimated 20% and reduce costs by an estimated 30%. Overall, the proposed training reinforces the Company's aim to accelerate speed and precision in the delivery of customize prototype products with greater efficiencies and reductions in waste. The proposed training will reinforce improvements in customer service. Additionally, planned technology upgrades include a roll-out of a new Enterprise Resource Planning (ERP) system which requires companywide training.

SOCT's in-house engineering and design capability offers a competitive edge for business growth and sets the Company apart from other cable manufacturers. However, the cable assemblies arena is becoming much more competitive in price and increasing customer demands. SOCT is growing its business by fulfilling contracts requiring more integrated and value-added assemblies that include sheet metal enclosures, computer controlled actuators, motors, electronic circuitry and devices that provide a higher level of product integration. The Source One Fundamentals training plan is designed to support this expanding area of the business.

SOCT's customers have high quality manufacturing standards such as ISO 13485, ISO 9001:2015, 21CFR820 and demand the same approach from their suppliers to ensure that the products are produced to exacting quality and performance standards. This means SOCT must maintain the same ISO certifications and meet the same regulatory requirements.

Training Plan

Training will be delivered by a combination of in-house subject matter experts and vendors (to be determined) based in California. OSHA training will be presented by an OSHA certified trainer.

Continuous Improvement: Training will be offered to all occupations as needed in an effort to develop efficiency (cost and lead time reduction). Lean Manufacturing (Kaizen and 5S) will help to reduce costs, improve quality, accuracy, reduce errors and speed delivery. An update to ISO 9001:2015 includes Risk Mitigation which will require more focus on Failure Mode and Effects Analysis both for design and process requirements. Formal Quality System training in Root Cause Corrective Action, and Six Sigma all assist with improving efficiency and saving costs.

Management Skills: Will be offered to Supervisors and Managers only. Topics include: supervisory skills, strategic management, project and timeline management, project planning, team building and leadership. The supervisors and managers at SOCT do not have prior experience managing people. Therefore, the training being offered is critical in furthering the Company's goals of upgrading the skills of the workforce so that each employee demonstrates improved competencies. Enhanced supervision is aligned with the Company's aim to improve quality, reduce waste, improve delivery time, and ultimately grow the business.

Manufacturing Skills: Training will be offered to Production Staff, Supervisors and Managers. Advanced Manufacturing Techniques fall into two categories: product fulfillment and product protection. Product fulfillment involves skills such as crimping, soldering, injection molding, insert molding, transfer molding, measurement and testing. Product protection involves skills such as cleaning, packaging and Electro Static Discharge measures. To perform these tasks production associates must be trained in equipment operation and the underlying principles. To improve quality, training in assembly operations improvements, IPC/JST training, Quality Control, Quality at the Source, Electronic Testing and troubleshooting are being delivered. IPC

610 training is also required along with topics which help the Company meet customer expectations related to required certifications which the Company maintains.

OSHA 10/30: Training will be offered to Production Staff to improve safety and reduce waste. This training is a series of courses bundled by industry sector and occupation. It consists of 10 hours of classroom training for production workers and 30 hours for frontline supervisors. This coursework is geared to manufacturing. Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors are Cal-OSHA certified.

Business Skills: Training will be offered to Production Staff, Office Staff and Administrative Staff. Skills to strengthen strategic planning and penetrate new markets are needed to implement business changes that will support more rapid, but reliable growth. Due to ISO certification requirements and strategic goals established by the Company, staff needs training to better understand and execute contract reviews, supplier management, customer service, document and inventory controls. This training will enable the organization to manufacture and better service new clients, while managing the performance of expanded growth initiatives.

Computer Skills: Training will be offered companywide**.** As a contract manufacturer, a firm grasp of scheduling, inventory control, purchasing and on-time delivery are among key customer satisfaction requirements in addition to keeping costs low and quality high. The training will include the roll-out of a new ERP System, changes to existing proprietary software systems and server/hardware upgrades. Training on new computer software such as CAD/CAM will generate improved electronic design skills and broaden business development opportunities. Transparency and accuracy in the control of work orders, personnel records, and meeting various stakeholder reporting requirements will provide greater financial and other operational inputs for more informed decision making. Training will be delivered to IT team leaders in a train-the-trainer program. From there the training will be extended to all departments. Updates to HR, accounting, document control processes and other key system upgrades will create a more compatible, faster, and more reliable environment supportive of SOCT's business development goals.

Literacy Skills: Training will be offered to Production Staff and Office Staff; non-native English speakers with job requirements where basic vocational English language or math skills are required and currently assessed as needing improvement. Literacy skills training is limited to no more than 45% of total training hours, per trainee.

Impact/Outcome

SOCT is ISO 9001 certified, but will update to 9001:2015 standard and also include IPC 610 to remain competitive based on customer demands. The proposed training is anticipated to help the Company attract new business and develop new products and services by establishing a high-performance workplace where front line workers and teams are increasingly able to determine and affect the success of the Company. SOCT plans to measure improvements in efficiency and track progress towards reaching a self-imposed 10% annual revenue increase goal correlated directly with the training plan and changes being made at the Company under new leadership. The Company hopes to obtain demonstrated increases in the skill sets within SOCT's workforce and reduce any lost production time through targeted cross training in order to reduce losses, prevent waste, increase production and boost sales, while delivering quality products in record time. The workforce itself will benefit by having upgraded skills which could give them upward mobility in addition to greater job security.

Temporary to Permanent Hiring

The trainees in Job Number 1 come under Panel guidelines for “temporary to permanent” employment. SOCT has retained an estimated seven employees through a temporary agency, with the intention of hiring them into full-time, permanent positions after training.

These trainees must be determined eligible to participate in ETP-funded training before the start of training, while on payroll with the temporary agency. However, the retention and post-retention wage requirements cannot be satisfied until after they have been hired by SOCT. Until then, SOCT will not receive progress payments for any that is not full-time permanent.

RECOMMENDATION

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum

Class/Lab/ Elearning Hours

8-60 Trainees may receive any of the following:

BUSINESS SKILLS

- Budget Analysis
- Business Plans
- Business Process Reengineering
- Business Strategies
- Computer/Internet Applications in Business
- CRM
- Customer Service
- Developing Sales Strategies
- Developing Marketing Strategies
- Financial Literacy
- Inventory Control
- Listening Skills
- Materials Management
- Marketing for Small/Medium Sized Manufacturers:
  - Evaluating Marketing Effectiveness
  - Marketing Concepts
  - Marketing Techniques
  - Practical Marketing Applications
- Negotiating Skills
- New Product Introduction
- Project Management Techniques
- Relationship Building for Small/Medium Sized Manufacturer
- Business Administration for Small/Medium Sized Mfg.
- Selling/Serving the Customer
- Strategic Planning
- SWOT (Strengths, Weaknesses, Opportunities, Threats) Analysis
- Sustainability
- Effective and Technical Writing

COMPUTER SKILLS

- Accounting Systems
- Basic Operations
- CAD
- CNC
- Computer-based/Web-based Training Systems
- Communications Systems
- Database Management
- Desktop Publishing
- Digital Entertainment Systems
- Disaster Recovery
- ERP/MRP
- Graphics

- Internet / Internet Security
- Microsoft Server Maintenance & Administration
- Networking
- Payroll Systems
- Presentation
- Programming
- Publishing
- Recovery
- Spreadsheets
- System Diagraming
- Technical Writing
- Telecommuting
- Website Development and Maintenance including HTML
- Word Processing

CONTINUOUS IMPROVEMENT

- Assessment Principles
- Audit Principles
- Basic Quality Tools
- Benchmarking Principles
- Building Teams
- Business Improvement Principles
- Communication Skills
- Continuous Improvement Skills
- Creative Problem Solving Skills
- Cycle-time Reduction Techniques
- Cycle-time Management Techniques
- Decision Making Skills
- Defining Problems
- Design for Manufacturing and Assembly (DFMA)
- Design of Experiments
- Design for Assembly (DFA)
- Developing Action Plans
- Developing Solutions
- Effective Meetings
- Effective Teams
- Implementation Skills
- Interpreting & Analyzing Data
- ISO 9001, 13485 etc
    - Quality Auditor Training
- Injection Molding Training and Process Optimization
- Just-in-Time Production (JIT):
    - Cycle-time Reduction
    - Cycle-time Management
    - Developing JIT
    - Evaluating JIT
    - Implementing JIT
    - Organizing for JIT
    - JIT Principles

- JIT Production
- Lean Manufacturing
- Leadership Skills
- Manufacturing Excellence
- Monitoring The Process
- Presentations
- Process Control Principles
- Process Capabilities
- Process Improvement
- Process/Product Handling
- Production Scheduling
- Production Operations/Workflow
- Root Cause Analysis
- Self-directed Work Teams
- Situation/Problem Analysis
- <u>Statistical Process Control (SPC):</u>
  - Data Collection
  - Design for Manufacturing and Assembly
  - Design of Experiments
  - Developing SPC
  - Documenting Processes
  - Evaluating SPC
  - Failure Mode Effects Analysis
  - Five S Principles
  - Graphing
  - Implementing SPC
  - Kaizen Principles
  - Kanban Principles
  - Key Process Indicators
  - Lean Manufacturing Principles
  - Organizing for SPC
  - Root Cause Analysis
  - SPC Concepts, Theory & Application
  - SPC Tools
  - Statistical Process Control (SPC)
  - Six Sigma
  - Statistical Techniques
  - Taguchi Methods
  - Variation/Process Control
  - Validation
- System Analysis
- System Strategies
- Taguchi Methods
- <u>Team Building/Problem Solving:</u>
  - Building Teams
  - Communication
  - Creative/Innovative Thinking
  - Decision Making
  - Developing Action Plans
  - Developing Solutions

- Effective Teams
- High Performance Work Teams
- Leadership
- Problem Solving
- Self-directed Work Teams
- Situation/Problem Solving
- Team concepts
- Team Building/Problem Solving
- Teamwork in an Empowered Workforce

- Total Quality Management (TQM):
  - Audit Planning
  - Basic Quality Tools
  - Benchmarking
  - Business Process Improvement Change Process
  - Continuous Improvement
  - Creative Problem Solving/Innovation
  - Creative/Innovative Thinking
  - Developing TQM
  - Evaluating TQM
  - Implementing TQM
  - Organizing for TQM
  - Quality Concepts
  - TQM Strategies
- Train the Trainer
- Value Stream Mapping
- Variation/Process Control

MANAGEMENT SKILLS (Managers or Supervisors Only)

- Appraisal Skills
- Coaching/Feedback
- Communication Skills
- Conflict Management
- Decision Making/Problem Solving
- Developing Teams
- Effective Meetings
- Effective Writing
- Facilitation Skills
- Finance for Small/Medium Sized Manufacturers
- Good Manufacturing Practices (21CFR820)
- Leadership/ Management Development
- Management Skills
- Management Styles
- Managing Change
- Managing Customer Service (Internal & External)
- Managing Innovation
- Manufacturing Cells
- Marketing for Small/Medium Sized Manufacturers
- Performance Management
- Project Management

    - Strategic Planning
    - Supervisory Skills
  - Negotiations
  - Leadership
  - Effective Communication
  - Decision Making
  - Teambuilding
  - Administration
  - Coaching Procedures.

MANUFACTURING SKILLS

- Assembly Operations
- Automated Equipment
- Bio-science Manufacturing
- Blueprint Reading
- Computer Aided Design (CAD)
- Computer Aided Engineering (CAE)
- Computer Aided Manufacturing (CAM)
- Computer Numeric Control (CNC)
- Cellular Manufacturing
- Chemistry
- Computer Electronics
- Cycle Time Reduction
- Cutting
- Electro Static Discharge
- Electronics
- Electronic Assembly Workmanship
- Equipment Operations
- Equipment/Preventive Maintenance
- Facilities Management
- Forklift
- Five S Principles
- Good Manufacturing Practices (GMP)
- Handling Changes
- Injection Molding
- Inventory Control
- International Standards Organization (ISO) Certification
- ISO Documentation Principles
- Kaizen Principles
- Kanban Principles
- Layout
- Lean Manufacturing Principles
- Machining
- Maintenance Mechanic Overview Level 1
- Maintenance Mechanic Overview Level 2
- Machine Tool Technology
- Introduction to Hand Tools
- Manufacturing Processes
- Master Production Scheduling (MPS Planning)

- Meeting Customer Expectations (Internal/External)
- Metrology/Geometric Dimensioning & Tolerances
- Manufacturing Resource Planning (MRP)
- Optimal Operating. Methods
- Pneumatics/Hydraulics
- Presses
- Production Planning
- Production Techniques
- Programmable Logic Controllers (PLC)
- Quality
- Re-engineering Concepts
- Root Cause Analysis
- Set up Reduction
- Shipping/Receiving
- Shop skills -- Drawing, Measurement and Instrumentation
- Soldering Skills
- Special Machines/Inspections
- Statistics Skills for Operations
- Technical Training
- Total Productive Manufacturing
- Total Quality Management
- Training Within Industry (TWI)
- Understanding Product Specs/Drawings
- Value Stream Mapping
- Warehousing Operations/Distribution
- Welding
- Workflow
- World Class Manufacturing Principles
- Analysis Critical Control Points

OSHA

- OSHA 10
- OSHA 30

LITERACY SKILLS

- Vocational English Second Language
- Basic Writing Skills
- Completing Job-related Forms
- Computer Skills
- Reading Comprehension
- Basic 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 60 total training hours per trainee, regardless of the method of delivery.

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

West Communication Service, Inc. dba Communication Service Corporation

Small Business ≤ $50,000

ET16-0129

Approval Date: July 30, 2015

ETP Regional Office: San Francisco Bay Area **Analyst:** L. Lai

CONTRACTOR

- Type of Industry: Construction

  Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees

  California: 6

  Worldwide: 6

  Number to be trained: 6

  Owner ☒ Yes ☐ No
- Out-of-State Competition: Customers Outside CA
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 5%
- Repeat Contractor: ☒ Yes ☐ No

FUNDING

- Requested Amount: $5,772
- In-Kind Contribution: $6,000

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 Priority Rate	Business Skills, Computer Skills, Commercial Skills, PL-Comm. Skills	6	8 - 60	0	$962	$15.07
				Weighted Avg: 37			

- Reimbursement Rate: $26 SB Priority
- County(ies): Santa Cruz
- Occupations to be Trained: Admin/Support Staff, Technical Staff, Manager, Owner
- Union Representation: ☐ Yes ☒ No
- Health Benefits: $1.07 per hour

SUBCONTRACTORS

- Development Services: Sallyanne Monti Consulting in San Francisco assisted with development for a flat fee of $200.
- Administrative Services: Sallyanne Monti Consulting will also assist with administrative services for an amount not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

OVERVIEW

West Communication Service, Inc. dba Communication Service Corporation (WCS) (www.comserviceco.com) was founded in 1952. The Company provides fabrication, assembly, wiring and installation, and testing and maintenance of unified telecommunication products and systems. These systems include telephone, voicemail, intercom, closed-circuit television, entry systems and voice and data cabling. Customers include chain retail establishments, governmental agencies, private residences and small professional offices.

This will be WCS's second ETP-funded training project. The previous Agreement enabled the Company to train employees in the integration of IP Telephony, a progressive technology that replaced signaling over copper wires and elimination of wasteful activities through the implementation of Continuous Improvement practices.

This proposal is driven by the reality that a once premise-based/stand-alone communication hub installed at a customer's site and tied into a physical central office phone system is being replaced with a fully networked, feature rich internet-cloud based system. Telephone equipment, connectivity and features now require connectivity with the internet. This rapidly evolving technology allows for a unified communication to/from multiple locations, across various platforms or devices. Technicians must expand on their knowledge of IT connectivity

with a variety of switches/firewalls/ routers etc. to allow communication across all platforms, replacing physical equipment with "cloud based" solutions.

Training Plan

Business Skills – Training will be delivered to Admin/Support Staff and Owners to enable them to effectively manage and plan various aspects of a project, integrate technical installation criteria and technology availability in small business operations. Prioritize customers and schedule staff resources across multiple projects to ensure projects begin on time, stay on schedule and have adequate technical oversight.

Computer Skills – All occupations will be offered training in the new Field Service Software to manage customers, work orders, invoicing and scheduling. Training will result in a greater ability to rapidly respond to client system fails in the field. WCS must be able to provide immediate response to get the system back up and running.

Commercial Skills – Training will be delivered to the Manager, Admin/Support and Technical Staff, in cloud-based virtual web-based systems with integration of audio & video Internet Protocol Communications.

Productive Lab – Commercial Skills

WCS states that Productive Lab (PL) training is necessary to demonstrate the proper ways to navigate and integrate software upgrades into existing processes, operate equipment, install structured cabling and communication systems, troubleshoot and maintain systems. Training cannot be replicated in a Class/Lab environment because of the complexity of the various systems and the need to customize to each jobsite. PL will be provided at both the Contractor's and clients' sites. Some portion of the assembly, programming and integration can be done at the Contractor's site while the rest of it can only be tied in at the customer site.

Four trainees (Admin/Support, Technical, and Manager) may receive up to 24 hours of PL-Commercial Skills. Admin/Support Staff lead clients through testing and offer initial tech support and therefore require PL Training.

The Company is requesting a trainer-to-trainee ratio of 1:3 because as a small business with only six employees, it would be more cost-effective and allow the trainees from different department to be trained as a team. The tasks and competencies associated with the proposed PL training are on file and support the Company's request.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET14-0123	Santa Cruz	09/03/13 – 09/02/14	$8,190	$8,190 (100%)

Exhibit B: Menu Curriculum

Class/Lab Hours
8 – 60

Trainees may receive any of the following:

BUSINESS SKILLS
- Project Management Skills
- Small Business Administration

COMPUTER SKILLS
- Field Service Software:
  - M-Help Interface

COMMERCIAL SKILLS
- Emerging Technology Fabrication & Testing:
  - Cloud-Based Communications Technology
  - Web-Based Camera Integration

E-Learning Hours
0 – 60

BUSINESS SKILLS
- Project Management Skills
- Small Business Administration

COMPUTER SKILLS
- Field Service Software:
  - M-Help Interface

COMMERCIAL SKILLS
- Emerging Technology Fabrication & Testing:
  - Cloud-Based Communications Technology
  - Web-Based Camera Integration

Productive Lab
0 – 24

COMMERCIAL SKILLS (Ratio 1:3)
- Emerging Technology Fabrication & Testing:
  - Cloud-Based Communications Technology
  - Web-Based Camera Integration
  - Pre-Field/Estimating
  - Structured Cabling Installation
  - Telephony Installation of Communication System
  - Sound/Intercom/Access Systems Installation
  - CCTV/Surveillance Systems Installation

Note: Reimbursement for retraining is capped at 60 total hour per-trainee, regardless of method of delivery. PL is capped at 24 hours per-trainee.

DELEGATION ORDER

Retrainee - Job Creation Training Proposal for:

Wolfe Video LLC

Small Business ≤ $50,000

ET16-0131

Approval Date: July 20, 2015

ETP Regional Office: San Francisco Bay Area **Analyst:** L. Lai

CONTRACTOR

- Type of Industry: Multimedia/Entertainment Services
  Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees
  California: 12
  Worldwide: 12
  Number to be trained: 15
  Owner ☒ Yes ☐ No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 8%
- Repeat Contractor: ☒ Yes ☐ No

FUNDING

- Requested Amount: $19,500
- In-Kind Contribution: $50,000

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate SB <100	Business Skills Computer Skills Mfg. Skills	12	8 - 60	0	$1,300	$16.44
				Weighted Avg: 50			
2	Retrainee Job Creation Initiative Priority Rate SB <100	Business Skills Computer Skills Mfg. Skills	3	8 - 60	0	$1,300	$13.70
				Weighted Avg: 50			

- Reimbursement Rate: Job #'s 1& 2: $26 SB Priority
- County(ies): Santa Clara
- Occupations to be Trained: Admin/Support Staff, Production Staff, Technical Staff, Manager/Supervisor, Owner
- Union Representation: ☐ Yes ☒ No
- Health Benefits: Job #1: $2.44 per hour Job #2: $0.20 per hour

SUBCONTRACTORS

- Development Services: Sallyanne Monti Consulting (SMC) in San Francisco assisted with development for a fee of $2,000.
- Administrative Services: SMC will also assist with administrative services for a fee not to exceed 13% of amount earned.
- Training Vendors: To Be Determined

INTRODUCTION

Wolfe Video LLC (Wolfe) was founded in 1985 as a distributor of film, video and media products for specialty markets. The Company provides full-service, custom design, licensing, and contract manufacturing services that include reproduction, assembly, packaging, warehousing and distribution. This is a woman owned business in San Jose.

Need for Training

This is Wolfe's fourth ETP project. The first project enabled the Company to integrate a new Enterprise Resources Planning system; the second enabled it to advance to Blu-Ray and High Definition production; and the last project helped it to expand services and products into social media outlets through a web store launch.

The training in this proposal will support Wolfe's goals to improve processes, utilize cloud-based technologies, and improve the product delivery system. Although the types of training may be

the same as in previous agreements, the course topics are different. In addition, this proposal includes a Job Creation component.

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.

Wolfe has committed to hiring 3 new employees (Job Number 2). The date-of-hire for these employees will be within the three-month period before contract approval or within the term-of-contract. Trainees will be hired into "net new jobs" as a condition of contract.

The Company is expanding existing business capacity by adding newly-hired employees to an existing function based on sales and revenue forecast. The Company is experiencing a 10-15% increase in business as a result of the expansion of the Wolfe Releasing Division. The new employees are needed to manage the growth. The Company does not plan to expand existing facilities as it currently has unused space to accommodate the new employees.

Training Plan

Business Skills: Training will be provided to Owners, Managers and Administrative/Support Staff in statistical operational and industry analysis. The goal is to improve processes by identifying and eliminating high cost markers in various areas of the business.

Computer Skills: Training will be provided to all occupations in cloud-based technologies such as Dropbox, Google Docs and proprietary systems to transfer information quickly. Owners, Managers and Administrative/Support Staff will also be trained in various accounting software to extrapolate real-time data and generate reports.

Manufacturing Skills: Training will be provided to Production Staff to implement a high speed direct ship delivery system. Trainees will learn new assembly, packaging and shipping techniques, guidelines and specifications.

Term Waiver

Wolfe is requesting a 2-year contract term for the following reasons:

- Hiring new employees will occur over a 6 to 9 month timeframe; the one-year does not fit with the Company's hiring and training plan for the new employees.
- The new MAS200 Accounting Software will be integrated in 2 phases: Phase I – integration, roll out and coding scheduled for the next six months; and Phase II – system go-live for real-time reporting and training. If contract is one-year, some of the training for the last phase may fall outside of the one-year timeframe.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET13-0153	Santa Clara	09/19/12 – 09/18/13	$49,296	$49,296 (100%)
ET11-0250	Santa Clara	04/18/11 – 04/17/12	$17,472	$14,040 (80%)
ET09-0287	Santa Clara	10/20/08 – 10/19/10	$53,560	$49,728 (93%)

Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 60

Trainees may receive any of the following:

BUSINESS SKILLS

- Advanced Financial Data Analysis
- Distribution Advancements
- Royalty Analysis & Tracking

COMPUTER SKILLS

- Advanced Excel
- Cloud-Based Technology
- MAS 200 Accounting Software
- Microsoft Systems Interface
- Online Movie Storage Interface
- Online Piracy Management
- Video Archiving
- Video On Demand Advancements

MANUFACTURING SKILLS

- Advanced Shipping Techniques:
  - Assembly
  - Bar Coding Interface
  - Labeling
  - Packaging
  - Shipping

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

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Wright Ford Young & Co., Certified Public Accountants and Consultants, Inc.

Small Business ≤ $50,000

ET16-0156

Approval Date: August 17, 2015

ETP Regional Office: San Diego **Analyst:** M. Ray

CONTRACTOR

- Type of Industry: Services

  Priority Industry: ☐ Yes ☒ No
- Number of Full-Time Employees

  California: 75

  Worldwide: 75

  Number to be trained: 67

  Owner ☒ Yes ☐ No
- Out-of-State Competition: Competitors Outside CA
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 8%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $41,272
- In-Kind Contribution: $52,899

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB<100	Business Skills, Commercial Skills, Computer Skills	67	8 - 60	0	$616	$22.00
				Weighted Avg: 28			

- Reimbursement Rate: Job #1: $22 SB Non-Priority
- County(ies): Orange
- Occupations to be Trained: Administrative Support Staff, Tax/Audit Staff, Senior Tax/Audit Staff, Manager, Director, and Partner/Owner
- Union Representation: ☐ Yes ☒ No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: Training Funding Group (TFG) in Irvine assisted with development for a flat fee of $3,000.
- Administrative Services: TFG will also assist with administrative services for a fee not to exceed 13% of earned funds.
- Training Vendors: To Be Determined

OVERVIEW

Founded in 1973 and located in Irvine, Wright Ford Young & Co., Certified Public Accountants and Consultants, Inc. (WFYC) (www.cpa-wfy.com), provides accounting; tax, estates and trusts; and business advisory services. Its customers are in real estate and construction; manufacturing and distribution; estate planning; and employee benefit planning industries.

The Company reports that it faces constant regulatory/compliance updates and changes brought by the Affordable Care Act, Generally Accepted Accounting Principles, Generally Accepted Auditing Standards and Internal Revenue Code. To continue to provide its customers with exemplary service, the Company must be adequately informed of the latest accounting rules, tax issues, and business plans.

To help meet this challenge, WFYC has developed a company-wide training program to enhance workers expertise, improve performance, and sustain that improvement. The need for training is also driven by WFYC's continuous effort to expand its business. The growth of the Inland Empire into a major area of construction, agriculture, and dairy required the Company to improve its accounting and consulting strengths critical to acquire new clients and remain competitive in the marketplace.

Workers require comprehensive training to improve the Company's ability to adapt to changing regulations and support increased customer demands. With the help of ETP funds, the Company will be able to provide extensive training to cultivate knowledge and dedication necessary to provide unsurpassed customer service and support the Company's growth.

Training Plan

WFYC plans to provide up to 60 hours of training to approximately 67 workers. The proposed training plan consists of the following:

Business Skills – Training will be provided to all occupations. Training topics in Customer Service, Communication, Presentation, and Marketing Skills will ensure employees develop the skills to provide quality customer service, improve customer relationships, and deliver informed presentations and recommendations. Directors and Partners will benefit from Leadership Skills training to improve management skills and create a better work environment.

Commercial Skills – Training will be provided to all occupations. Specialized training topics in Accounting and Auditing Updates, Tax Updates, Estates and Trusts Procedures and ERISA will enable workers to become excellent advisors by staying current and keeping clients in compliance with regulatory changes. Tax Staff will be able to understand new interpretations of existing law to provide the best benefit to the Company's customers. Audit Staff will be able to become experts in new requirements by financial institutions.

Computer Skills – Training will be provided to all occupations. Training in Quickbooks, Intermediate Microsoft Office, Adobe Office Suite and CCH Software Suite will enable employees to create databases, spreadsheets, reports, charts, graphs and professional presentation materials to improve productivity.

RECOMMENDATION

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum

Class/Lab Hours

8 - 60 Trainees may receive any of the following:

BUSINESS SKILLS

- Leadership Skills
- Teambuilding Skills
- Communication Skills
- Marketing Skills
- Presentation Skills
- Customer Service

COMMERCIAL SKILLS

- Fraud (detection, analysis, review)
- Best Practices:
  - Audit Techniques
  - Tax Strategies
  - Project Management
- Accounting & Auditing Updates
- Employee Retirement Income Security Act and Employer Benefit Plans
- Tax Updates
- Technical Updates/Procedures (changes to accounting and auditing procedures)
- Estates and Trusts Procedures
- Professional Networking Management
- Client Management Skills

COMPUTER SKILLS

- Quickbooks
- Microsoft Office (Intermediate)
- Adobe Office Suite
- Checkpoint Research
- Commerce Clearing House Software Suite

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